LEARNING MADE EASY

3rd Edition

YouTube® Channels

for dummies®

A Wiley Brand

Film and edit high-quality videos

Grow your channel and build an audience

Monetize and promote your content

Rob Ciampa
Matt Ciampa
Rich Murphy
Jackie Swansburg Paulino

YouTube® Channels

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3rd Edition

by Rob Ciampa, Matt Ciampa, Rich Murphy, and Jackie Swansburg Paulino

for dummies®
A Wiley Brand

YouTube® Channels For Dummies®, 3rd Edition

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Introduction

Maybe you're looking to become a YouTube sensation with your next video or simply want to share your insights or expertise with the world. Perhaps you'd even like to use YouTube and video to help your business, which could be a local coffee shop or a Fortune 500 company. Maybe YouTube can actually be your business. No matter how you plan to use your video-making skills, YouTube has made sharing the results of those skills easy. And with the tips and techniques included in this edition of *YouTube Channels For Dummies,* you'll be ready to take full advantage of YouTube's user-friendly platform when creating your very own YouTube channel.

YouTube started off years ago as a simple video sharing site, ultimately going on to change the entertainment business and so much more. In many ways, it democratized creators and viewers, ultimately influencing how products were marketed, sold, and used. YouTube globalized the viewing experience, reinventing how people experience video content. Any viewer who wants to see any video anywhere in the world only has to type `www.youtube.com` into their favorite browser or bring up the YouTube app on their mobile phone.

Let's not forget that YouTube became one of the largest search engines in the world as well. Businesses started using videos to launch and support products all while bring a human face to the company. We also witnessed the rise of YouTube influencers, savvy participants who were often better connected to a company's audience than the business itself. They set the tone.

As easy as it is for a viewer to take full advantage of YouTube, it's almost as easy for a contributor to become part of the YouTube mix. After setting up an account, it's a snap to start uploading videos. And, if the videos you're uploading take off, you could become famous and even earn a good chunk of change from your YouTube exploits.

Notice that we said, "*if* the videos you're uploading take off." That can be a very big *if.* Not just any video will do. The truth of the matter is that the low-quality, badly shot videos that were popular some years ago no longer cut the mustard. Viewers expect higher quality these days, which is why you need to step up your game and produce the best possible content. This book can help show you the way.

About This Book

In some ways, reading a book to find out all about YouTube channels seems a bit odd. Isn't YouTube the place that specializes in videos designed to teach you about any topic on Earth? Why not just stick with the YouTube videos that are all about YouTube?

First off, it's a bit self-referential and insular to get all your information about YouTube channels from YouTube videos. Second, that video purporting to tell you how to strike it rich on YouTube may have been shot and edited by the neighbor kid down the street who has never made a dime from YouTube and who may never move out of Mom and Dad's basement. In other words, just as you shouldn't believe everything you read on the Internet, you shouldn't believe everything you see on YouTube. Sometimes it pays to listen to the true experts (like us) who have a track record in advising folks how to put their best foot forward on YouTube.

We also know that there are only so many hours in a day and that everyone's schedules seem to be getting more hectic each day. That's why this book that doesn't beat around the bush — it gets straight to the point so that you can get in and get out with the information you need. In that sense, *YouTube Channels For Dummies* is the exact opposite of all those wordy instructional manuals that spell out a hundred ways to do something. No matter if you're looking to set up a channel, create an effective header, or figure out ways to maximize your monetization potential, we show you the quickest, most effective way to get the job done.

Preparing the third edition of *YouTube Channels For Dummies* required us to examine several significant advancements inside and beyond YouTube. Since the first and second editions, we've seen the rise of *Shorts*, concise video segments often captured, edited, and uploaded from a mobile device. We are also seeing the rise of Artificial Intelligence (AI), which is greatly impacting how content is programmed and produced. Finally, YouTube has made big changes in YouTube Studio, the YouTube Partner Program (YPP), and the tools to help creators and businesses understand their audiences and make money.

You'll also learn about the relationship and differences between YouTube Ads and Google Ads. Since publishing the first edition nearly ten years ago, YouTube and its ecosystem have grown by leaps and bounds. In this edition, we distill all the richness and complexity down so you can understand how everything works while getting up to speed and building an engaged audience.

Foolish Assumptions

Whether you're experienced or have just started your channel, you should treat YouTube with an open mind. Just because it's easy to make a video and upload it to YouTube doesn't mean that you won't hit the occasional bump in the road, so don't fool yourself into thinking you don't need help from time to time. Imagine whether you can see yourself in one of these categories:

- **Newbies:** You shoot lots of videos but have never uploaded one to YouTube. But then the feeling overtook you to upload your best ones and share them with the world. No problem: This book can answer some of your most basic questions.

  You want your videos to look really cool so that you can post them on YouTube and all your other favorite social media haunts, and if you use this book to answer your most basic questions, trust us — your movies will be awesome.

  This book doesn't require your fluency in technospeak. Instead, it's written using a down-to-earth tone. Through clearly written explanations, lists, illustrations, and tips, you'll find out how to best use your equipment, set up video shoots, and navigate the YouTube upload process.

- **Creators:** There's never been a better place for independent creators to build their brands. It doesn't matter if you're a budding fashion and beauty expert or a seasoned small-engine repair technician — YouTube is where you can showcase your expertise and connect with people who care about what you do. Even if you've been doing this for some time, you'll find that there are now more capabilities. Maybe you'll become the next Mark Rober, the ingenious former NASA engineer with some pretty cool science and gadget videos. With nearly 60 million subscribers, he clearly got people interested.

- **Students:** If making videos is what you do and you're interested in sharing your work, this book can get you started by helping you set up your own YouTube channel. Since you already understand the fundamentals of making a video, you can concentrate on the creation and maintenance of your channel. Before long, you'll be uploading videos, building a following, and maybe even transforming your channel into the next Khan Academy.

- **Videographers:** You're already comfortable with making movies, you know all about effective editing practices, and you're ready to share your professional work with the world. You'll find tons of info in this book to help set up your channel and grow your audience so that you can transform your video page into a moneymaking endeavor. Ripe with tips, this guide puts you in the easy chair, filling in the blanks with the best ways to showcase your videos and effectively monetize your content.

- **Business professionals:** YouTube is great for business because it can help drive awareness and increase sales. These days, consumers turn to YouTube to learn more about the products or services they're considering. YouTube creators have become trusted advisors for viewers and more frequently collaborate with many of the world's most famous brands to give buyers (or potential buyers) all the information they need to enhance their product choices.
- **Entrepreneurs:** You may already have a moderate following on YouTube, whereas others are new to the game. Regardless of your level of success, you share the same goal, and that's to use YouTube as a business tool. Whether you're looking for the best ways to earn money with your channel or looking at the bigger picture for promoting your business or service, this book has much to offer for finding the most effective strategy.

How This Book Is Organized

This book is divided into five sections, with each section detailing the various phases of setting up and mastering your channel. If you see a particular area that concerns you, you should feel free to skip those chapters. Think of it as a smorgasbord of information.

- **Part 1: Getting Started with YouTube:** This section provides a swift overview of the YouTube ecosystem and how all the pieces fit together. You'll be up and running quickly, no matter if you're a beginner looking to share videos with a global audience, a working video professional looking to take advantage of monetization, a business owner looking to close the distance, or anyone in between.
- **Part 2: Making Great YouTube Videos:** The chapters in this part cover modern video production and cinematography. You'll learn managing programming and content, navigating shoots and sound, and using the right software tools for excellent results. You'll also learn about the ever-growing role of AI and how and when it can be leveraged most effectively during the production process.
- **Part 3: Growing, Knowing, and Engaging Your Audience:** The chapters in this part help you develop a content strategy that builds a subscriber base either using Shorts or long-form content. You'll learn about what aspects of YouTube Studio you can use to understand your channel's performance. This part helps you determine which video format and publishing schedule works

best with your audience. Finally, you'll learn about first-party (1P) data, which is information about your subscribers, visitors, and customers.

- **Part 4: YouTube Channels Are Serious Business:** This part covers what you need to get started with the business side of YouTube. You'll learn about how to make money on YouTube and understand how to become part of the YouTube Partner Program (YPP). You'll also learn about Multi-Channel Networks (MCNs), independent organizations that offer a range of administration, monetization, and other services to creators. Finally, this part goes deeper into the application of AI beyond production and into content planning and channel strategy.
- **Part 5: The Part of Tens:** This part provides insight into improving your YouTube search results so that viewers are better able to track down your masterpiece. You'll also find out ten things everyone should know about copyright so that you can keep the lawyers off your back.

Icons Used in This Book

What's a *For Dummies* book without icons pointing you in the direction of truly helpful information that's sure to help you along your way? In this section, we briefly describe each icon used in this book.

This icon points out helpful suggestions and useful nuggets of information.

This icon marks a generally interesting and useful fact — something you might want to remember for later use.

When you see this icon, you know that there's techie stuff nearby. If you're not feeling techie, feel free to skip it.

The Warning icon highlights lurking danger. With this icon, we're telling you to pay attention and proceed with caution.

Beyond the Book

This book isn't the end of your experience with YouTube channels — it's just the beginning. You remember using SparkNotes in school to get a better mark on a test, don't you? You do? Well, our cheat sheets are sort of like that. They provide you with some special notes about YouTube-related tasks that not every other person knows. To access them, go to `www.dummies.com` and type **YouTube Channels For Dummies Cheat Sheet** in the search box.

1 Getting Started with YouTube

IN THIS PART . . .

Understanding the YouTube ecosystem and where you and your channel can fit in

Mastering the YouTube basics

Seeing what's involved in building your own YouTube channel

IN THIS CHAPTER

- Understanding the importance of being on YouTube
- Becoming a viral video star
- Making your channel unique
- Producing video for fun and profit

Chapter 1

Understanding the YouTube Ecosystem

For its first decade, YouTube was the new business-and-entertainment frontier, which meant there was as much excitement and creativity associated with creating and managing a YouTube channel these days as was the case during the early days of television, when the sky seemed the limit. YouTube — like television before it — was caught up in the same adventure that comes from defining its target audience as well as finding out what audiences are willing to watch.

At this point, YouTube has grown into something even bigger than TV itself, with global reach and ever-expanding content types, from live television, to music, to gaming, and much more. But one important thing hasn't changed: YouTube remains open 24x7 to anyone who wants to create content and establish their own channel to promote it. And that's what this book is about: helping you establish your own distinct place in what we call the *YouTube ecosystem.*

On the surface, the YouTube ecosystem seems to consist of little beyond content creators and an audience looking to be educated or entertained. But there's so much more that you, as a YouTube channel creator or viewer, need to understand even if your expectations are modest: monetization, MCNs (*Multi-Channel Networks)*, subscriptions, and so on.

It doesn't matter whether you're a proud do-it-yourselfer working on your house, a fashion and beauty influencer commenting on the upcoming *Fashion Week* lineup, a consumer brand launching a new product, or a Fortune 500 company providing instructions on industrial equipment. We've got you covered in this book. For all of you creating your own YouTube channel, it's much more about meeting the diverse interests and needs of an audience that attracts more than a billion people from all over the planet.

The YouTube Creator Phenomenon: Why You Need to Be on YouTube

Having more than 2.5 billion monthly active users — that's not a typo — can make getting noticed on your channel feel like searching for a virtual needle in an online haystack. Yet, regardless of the steep increase in competition, the intention has always been the same — get people to watch your channel. But it's not all bad news: You also have an advantage over your counterpart in the 1940s. Back then, it took a great deal of capital to get started on television. Today? Not so much. In fact, if you just want a platform for presenting some of your video work, YouTube can make that possible without your having to fork over one thin dime.

Knowing that YouTube is free to use should reduce some of your worries — at least from a financial perspective. Couple that with the size and diversity of the YouTube audience — and the endless number of topics that interest them — and it's easy to believe that you have a fair chance of success for your channel. That's true, up to a point — if the point is you want your channel to thrive, you need to provide your viewers with compelling content.

Saying that your channel needs to host solid content that people actually want to see seems as glaringly obvious as saying a hamburger joint must make a good burger in order to survive. But content merely makes up the first part of the equation. The rest depends on how you bring viewers to that content: While YouTube is free, video production certainly is not. Unless you want to shell out money from your own pocket, you need to generate some funds to produce high-quality content for your channel. In the world of YouTube, one major way to generate such funds is with advertising revenue — and it should come as no surprise that the more viewers you can attract, the greater your potential to generate advertising revenue. How much depends on your needs and ambitions, but increased revenue can lead to better production values, which brings it all back to more revenue.

But before you start worrying about all that money you're going to make, let's take a look at what it takes for you and your business to get started on a YouTube channel.

Gaining Success on YouTube

Like snowflakes on a winter day, or science with Mark Rober, YouTube has more topics that viewers can appreciate than any human can count. And because you already love making videos and most likely exhibit some expertise or viewpoint to share with the world, YouTube may be your best creative outlet.

On the downside, you're not the only one hoping to get noticed on YouTube. Many others with the very same intention are looking to build an audience for their YouTube channels, too. ("How many?" you may ask. The number exceeds the number of those preapproved credit card applications that plague your mailbox, so we're talking *lots*.)

Your journey on YouTube begins with knowing your strengths. Some users relish documenting the quirks of their existence to the gentle amusement of others. Others have some type of expertise to share. Then you have performers who regard the video hosting site as their personal stage — the list goes on and on. Even businesses realize it's a great place to inform consumers about their products or provide a great level of customer service. Regardless of your passion, a potential audience is waiting for you.

Audience, audience, audience

Have you ever noticed the repetitive way people describe the most important aspect of a piece of real estate? Yes, we know it's all about location, so much so that real estate agents, among others, feel compelled to say it three times, as though saying it once doesn't get the point across.

Maybe that need for the special emphasis that comes with repetition is justified because, when it comes to success on your YouTube channel, we're of the opinion that saying the word *audience* just once doesn't do justice to its importance. In paying homage to our real estate buddies, we can agree that success for your YouTube channel depends on [drum roll, please] audience, audience, audience!

What's a YouTube audience actually like? You'll find people from all walks of life, and you'll soon discover that they can spend a great deal of time meandering through YouTube's seemingly endless virtual walls, sometimes just entertaining themselves, sometimes educating themselves, sometimes engaging quite passionately with what they see, sometimes letting it all just wash over them. Given the amount of time folks spend on the site, there's a good chance that someone ends up seeing your video. Not a great chance, of course, given that the site has so much content and only so many viewers to watch that content — but still a good chance.

So, how do you move from "good chance" to "great chance"? First and foremost, your success depends on the strength of your content. Right behind strong content, though, you'll find that you need to be a virtual wrangler, capable of bringing to your channel people who may not know anything about you. To do that, you need to know what excites your viewers, what they're looking for in video content, and how they consume what they like. With that information in hand, you can fine-tune your content to better serve your (current or potential) audience.

REMEMBER

Gathering information on the viewing habits of your audience is a crucial first step in determining what they want to see and how long they're willing to watch your videos. YouTube makes it easy to gather lots of information about your viewers — YouTube Analytics, covered in Chapter 10, is a big help here — but consulting friends and family about their viewing preferences is sometimes a good place to start.

Incorporating YouTube into your business and marketing plans

Just like cool sheets on a summer evening, YouTube goes perfectly with social media when it comes to your business and marketing needs. Why not? You already know that your presence on Instagram, TikTok, Facebook, or X keeps you connected with all the right people. Guess what? YouTube can help raise your social media profile as well. (See Figure 1-1.)

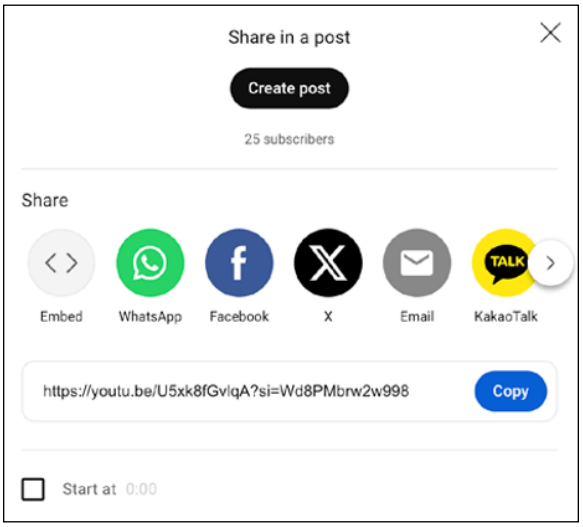

FIGURE 1-1: Using social media can let people not on YouTube know there's something for them to check out.

By integrating your video content with social media, you can drive interested parties to your channel; your channel, in turn, can point them back to your social media platforms and your contact information. This synergy helps build a strong following, because you can inform potential customers about your business via multiple avenues.

REMEMBER

Video is the perfect partner when it comes to showing products, giving demonstrations, providing tutorials, or showcasing other features designed to increase awareness of your brand. And YouTube is the perfect partner to host your videos.

When coming up with a plan to incorporate your YouTube-based video content into your business and marketing plans, here are some areas to consider:

- **Give your videos effective titles.** Your video should have clear and succinct titles. The titles should get to the point about your product or service so that people can easily find your video.
- **Create eye-catching thumbnails.** Make your videos stand out from the crowd. Thumbnails are a great way to catch viewers' attention and compel them to click through.
- **Add more metadata.** On YouTube, metadata is comprised of the title, video tags, and description of your videos. Coming up with a strong title is a good place to start, but it doesn't end there. You should also add a detailed description of the video, as shown in Figure 1-2, and use the appropriate *keywords* — specific words that are representative of your video's subject matter — that fit the content. The more information that's included with each video, the easier it is for viewers to find exactly what you have to offer in a Google search.
- **Include your contact info on the video.** Always add your business or personal information to the video and its description fields, such as email address and social media sites.
- **Think shorts too.** Even if you've made some awesome long-form video with your super-duper digital camera, don't run away from some vertical video content shot from your phone. Just make sure it aligns with or complements your overall channel objectives.

Becoming a star!

Are you ready for your close-up? Or maybe framing a close-up is your thing. It doesn't matter, because YouTube gives you a platform right up there with radio, film, and television as yet another means of achieving stardom. By doing so, YouTube has created a dedicated community that offers one more way for the world to notice you.

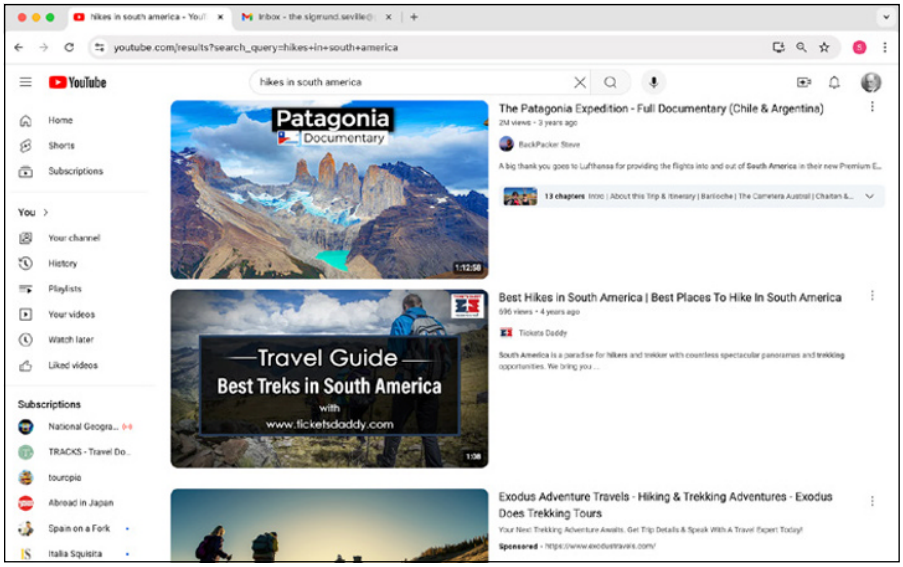

FIGURE 1-2: The strong metadata of these videos allow them to show up on the first page of the search results for popular travel topics.

The thought of stardom often leans toward actors and musicians — and the creators behind them. Many have found great success after being discovered on YouTube. (Can you say "Justin Bieber" or "The Weeknd"?) The rock band Journey found its current lead singer on YouTube. You may not get a spot on *American Idol* or an audition with a music label, but you can get on YouTube. Our job here is to help you get noticed.

Actors have also found work by showcasing their clip reels, performances, and auditions. YouTube has made many stars of its own — personalities offering everything from rap parodies to lip-syncing to video game analysis and commentary have made a name for themselves on YouTube. Mark Rober, to take one example, has been watched by millions of viewers. (See Figure 1-3.)

So, proof positive that YouTube can provide a stage big enough to start, and perhaps sustain, a career.

Going viral

If you're a millennial or someone who remembers the world before the turn of the century, the phrase "going viral" could have two different meanings. So, in addition to meaning the spread of a virus, which is a bad thing, the term refers to the rapid spread of a video, and that's a great thing.

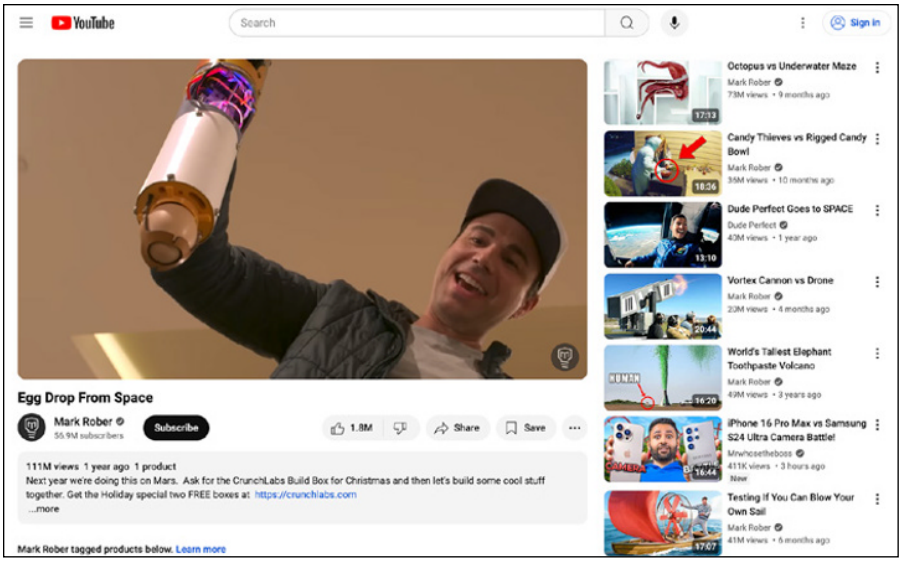

FIGURE 1-3: One of Mark Rober's more popular videos.

When an uploaded video goes viral in the good sense, it becomes a sensation that users share and share and share — in the process gathering more numbers of viewers than there are grains of sand in an hourglass. Having your video go viral is like releasing a hit record or having your book make *The New York Times* best seller list, except that you're unlikely to get anywhere near as rich from going viral even if you get a couple of million hits.

TIP

Planning on a video going viral is like planning on winning the lottery. It *could* happen, but you shouldn't bet on it. If you are seriously interested in earning some ad revenue from your video content, work on creating a range of compelling content for your channel, rather than hoping on that one-shot, grand slam home run.

There's no way of telling whether a video will go viral, but there are some traits that successful ones share. Although we discuss ways throughout this book to improve the odds of your video going viral, here are some factors that can make a video a runaway success:

- **Be spontaneous.** There's a real in-the-moment feel to a viral video that captures a random and decisive moment that you could never repeat. YouTube Shorts are great for grabbing attention quickly. The popular short, "How Zach King Gets Away With Doing Graffiti" and its more than 1.2 billion views comes to mind.
- **Be light-hearted.** People love stuff that's silly and that makes them laugh and think — or that even make them consider trying something, much like TikTok or YouTube blooper reels that draw hundreds of millions of views.

- **Get it out on social media.** Yeah, you can rely on chance that someone stumbles across your video, but that's sort of passive, like waiting by the phone for someone to "find you" for the job. A better tack is for you to let social media know about your latest masterpiece. Just a few tweets here, a Facebook post there, and then maybe an announcement on Reddit can instantly start turning the wheels of virality.

Wasting lots and lots of time

One person's waste of time is another's quest for information, or someone's need to laugh or learn about something, so YouTube viewers simply spend a lot of time watching videos.

That's a good thing, and a win-win situation all around. The audience gets its dose of entertainment, education, and exploration. And your channel benefits because, as viewership increases, so does the potential for someone to find you. And, when that someone finds your channel and you happen to have set it up for receiving advertising revenue (the YouTube term here is *monetization*), you can earn some money.

Here are some numbers, provided by YouTube, that indicate how much (potential) time-wasting is really going on:

- More than 2.5 billion unique users visit YouTube each month.
- Billions of hours of video are watched daily on YouTube.
- According to Nielsen, YouTube reaches more U.S. adults ages 18 to 34 than any cable network.

Seeing What Makes a YouTube Channel Unique

Four walls do not make a home — but it does provide a good start. How you adorn those walls and furnish those halls is what makes it uniquely yours — uniquely your home, in other words. Well, your YouTube channel isn't much different.

When you first create a YouTube channel, it's nothing more than an empty template on a page. Over time, you add videos, organize videos into playlists, and create channel art with your own logo, designs, and branding. Obviously, your

video content plays a big part in what makes your channel special, but so does the channel's look and feel. Everything from the layout and font color to the type of content and its subscribers helps set one channel apart from the others.

Though this book takes pride in describing effective ways to create and maintain your YouTube channel for the next couple of hundred pages, let's look at some basics first:

- **Have people find your channel.** If a tree falls in the forest and nobody hears it fall, does it make a sound? Who knows? More appropriately, if you create a YouTube channel and nobody visits it, it's a safe bet to say that all your good work has come to nothing.

  Viewers have to know that your channel exists before they can visit. The main way you have of letting people know you exist is by making sure your content shows up high in the search results of both Google and YouTube itself. (Don't forget that YouTube is the second-most-popular search engine, just behind Google.) To get those high rankings, you have titles, tags, and descriptive text to associate tons of search-engine-friendly keywords with each of your videos — doing that will bring viewers searching for content in contact with *your* content rather than with someone else's content. It's also important that viewers watch, like, comment on, and share your video — yet more indications to the search engines and YouTube's algorithms that your content and channel are important. For good measure, use social media to prep your audience for content that's coming down the pike — just like a movie studio creates a buzz for a big summer blockbuster by teasing you with previews and trailers weeks before release.

  REMEMBER

  Users often take advantage of YouTube's personalized video recommendations, such as the Homepage Recommended feed (see Figure 1-4) and the Up Next feature. If a user clicks on your video and enjoys the content, there's a good chance they'll visit your channel to see what else you have to offer. The more appealing your channel looks at first glance, the more likely a viewer will be to stop and spend some time exploring your channel and your other videos.

- **Connect with your viewers.** You definitely want to build a community of followers, and for that to happen, you need to actively communicate with them. That means everything from having them subscribe to your channel, engaging with them in your channel's Comments section and on the Community tab, and exposing them to your other social media accounts. You can do all this directly on your channel page.

- **Provide viewers with a clear description of your channel.** When viewers know what your channel has to offer and if it appeals to their interests, they're more likely to visit often and maybe even subscribe to it. But you need to get the word out.

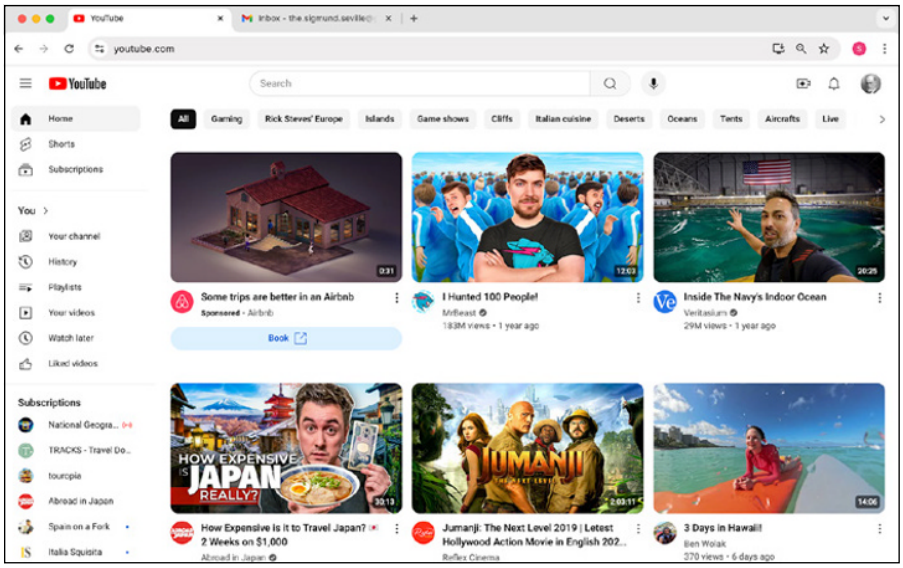

FIGURE 1-4: The YouTube Homepage Recommended feed.

Angling for subscriptions

Viewers who like your content will come back and watch more, but viewers who love your content will want to subscribe. Why not? When you keep reaching for the same print magazine whenever you see it, eventually you just subscribe to it so that it regularly comes to the mailbox at your front door. YouTube offers repeat viewers of your channel the same option. Basically, all they have to do is click the Subscribe button, as shown in Figure 1–5, on a channel's homepage.

After viewers subscribe to your channel, you have to make it worth their while to view it or else they'll unsubscribe faster than you can say "Selena Gomez." Here's what "making it worth their while" entails:

TIP

- **Stay in touch with subscribers.** According to YouTube, viewers subscribe to millions of channels every day, so it's important to stay in touch if you want to stay uppermost in their minds.

  Suggest to your viewers that they follow you on social media so you can let them know when new content is available. This strategy helps your audience grow as you amass a devoted fan base.

- **Actively upload videos.** It's difficult to imagine a television station maintaining viewers if it doesn't add new programs. Even if it were all *Friends* all the time, chances are good that viewers would eventually drift off to something else. Well, the same concept applies for your YouTube channel. If you don't upload new video content, you'll lose the interest of your subscriber base. The takeaway here? Always provide new content.

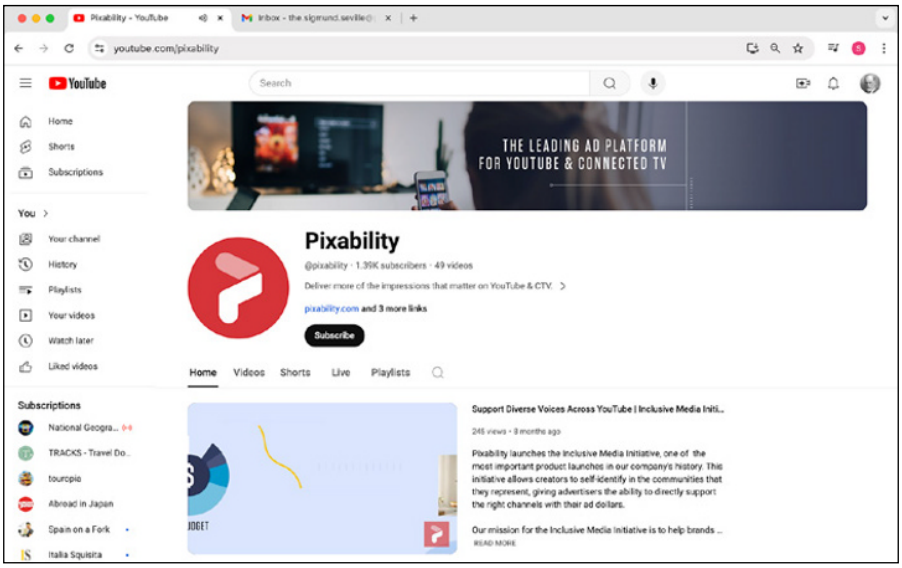

FIGURE 1-5: The Subscribe button lets viewers become subscribers with a single click.

» **Pay close attention to tagging.** When you *tag* a video, you categorize it after uploading it to YouTube. When a video is properly identified, it increases the possibility of someone else finding it, and that extends to future subscribers.

Establishing your brand

Whether it's a consumer or a viewer, a brand makes your product or service immediately identifiable. Imagine that the Coca-Cola logo looked different every time you saw it, or maybe the apple on your MacBook Air wasn't the same apple you saw embossed on your iPhone. This lack of consistency could shatter your confidence in the product; you may start wondering whether what you had was a cheap knock-off of the real thing rather than the genuine article.

Branding is designed to restore confidence in the product — that familiar logo makes you relax, knowing that you're sure to get the real thing. When it comes to your YouTube channel, branding becomes the identifiable element that lets viewers know who you are and what you're all about, thus creating a similar feeling of confidence. Just like consumers flock to brands they identify with, your audience will do the same with your brand.

Branding takes on many forms on YouTube:

- **Intro clip:** Before each video runs on your channel, you can insert a three-second clip that acts as a label for your content. The torch-carrying lady wrapped in a flag for Columbia Pictures and the roaring MGM lion are good examples of a branding element. Your job, if you choose to accept it, is to come up with an intro of your own that is equally compelling.
- **Channel header:** This element is the banner on top of your main page, and at first it's as empty as a blank page. (See Figure 1-6.) You'll definitely want to add a compelling picture or another graphic along with the name of your channel. The channel header can also include your contact info and specify how often you intend to upload new videos.
- **Logo:** Companies spend millions on branding when they have to come up with a new logo, because they have to track down and replace every single instance of the old logo. We're guessing that's not your problem — you just have to come up with your own logo, perhaps using a simple image and your name. If you feel graphically challenged, you can find places on the web that can create one for you inexpensively. Or just have an artistic friend design a logo for you.
- **Playlists:** If you have enough videos on your channel, you can create a running order of them. This playlist can provide an overview of your content or a specific subtopic of your videos. You can name every playlist, and even rearrange them.

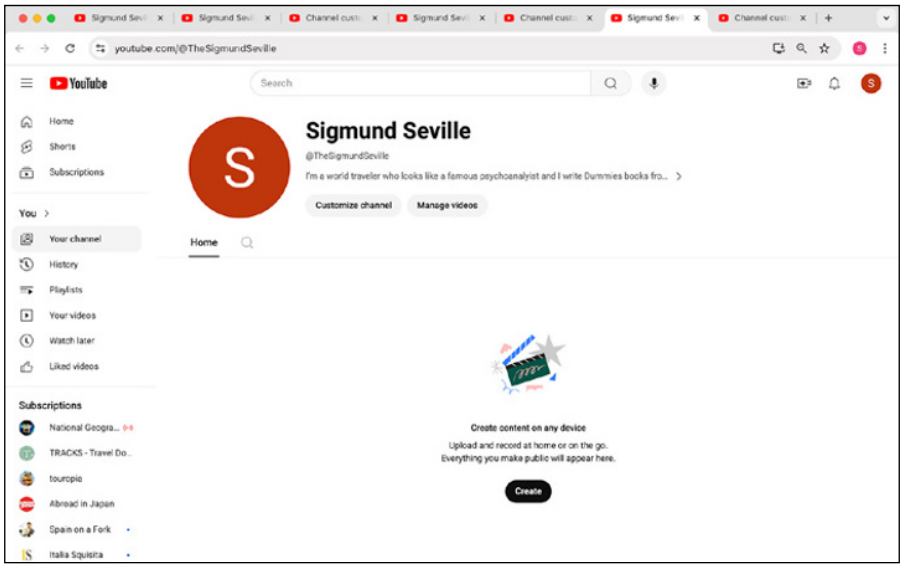

FIGURE 1-6: An empty header, waiting to be filled with an image that represents your content.

» **Trailer:** In a YouTube context, a *trailer* is a video that can automatically play whenever visitors come to your channel. You can use the video most representative of your content as a kind of advertisement for your offerings, or you can make a short video that shows viewers what your channel is all about and how they can benefit from watching your videos.

Managing Channels for Fun and/or Profit

Everybody has a reason for making a video, and YouTube doesn't discriminate on why you do it. Whether you were influenced a little too much by the silly, everyday situations depicted on a television series like *America's Funniest Home Videos* or you want to show off your post-film-school prowess or you're looking to educate the masses with a series of how-to videos, there's a place for you on YouTube — and (you hope!) an audience that's willing to follow your exploits.

In addition to the pleasure that comes from a job well done, there's (potentially) a business side to running a YouTube channel. If you post videos that draw a lot of views, it's worth your time to *monetize* your channel — generate some income from ad revenue, in other words. But that's not the only business purpose YouTube channels can help with: They can serve as a great showcase for your particular skills or services or act as a delivery system for product descriptions, tutorials, and testimonials associated with whatever your business is selling.

Creating content

Whether you grab a ten-second video of a gathering of friends, have something meaningful to say on your video blog, or plan a highly structured production with sets and actors, you're creating content.

Almost every topic under the sun is represented on YouTube. That diversity in topics is matched by an equally broad range of production levels. Some videos are quite sophisticated, displaying amazing production values, but many are fairly average. And a great deal are just poorly done and end up getting shown in film classes as examples of what not to do.

Better production values increase your ability to grab viewers' attention — maybe enough for them to watch the entire video and maybe enough for them to even consider watching whatever else you have to offer. The holy grail, of course, is having them feel so enthusiastic about what they see that they then share it with others.

But great video quality doesn't happen accidentally; rather, it's done consciously, from conception to upload. Though the topic is more thoroughly represented throughout this book, here are some key suggestions to always keep in mind:

REMEMBER

- **Plan before you film.** Great videos begin in preproduction. That means having an idea of the shooting location and working with some sort of script (or at least a storyboard of the kind of shots you want for the video).

  Great planning leads to great production.
- **Know your audience.** When you're just getting started, you try to make solid videos with good descriptions and hope that your audience finds you. After you have attracted a following, it's still important to understand who they are and whether your content is right for them. For example, if you start a channel that talks about SAT and college prep, you should use language that's consistent with a high-school-age demographic. Don't overlook the importance of being highly aware of your potential audience.
- **Keep viewers entertained.** Regardless of the subject matter, it's important for viewers to enjoy the experience so that you hold their attention. Remember that hooking a viewer's attention starts with the first five seconds of the video. (Why? Because viewers may leave before the good stuff starts!)
- **Let them learn something.** People generally click on a video description link in search of information. If they find it quickly and they were entertained, chances are good that they will love you and click through to products or services mentioned in the video.

Building an audience

After you create great content, you have to find people to watch it. After all, isn't that the entire purpose of sharing your video with the world? Whether it starts with the ten people who just happen to run across your student film or a million people viewing your talking puppy video, building your audience is essential.

YouTube is no different from other media when it comes to emphasizing the importance of building an audience. For example, you may have the catchiest song of all time, but if no one has ever heard it or even knows it exists, then that song cannot by any stretch of the imagination be called a success. The same is true for your videos — you need to work at getting as many people as possible to watch them.

Successfully building your audience depends on understanding their needs and making sure you can deliver on what your channel promises. Catering to your audience — whether it consists of one person or ten million — centers on understanding them and satisfying their appetite. (For more on building your audience, check out Chapter 8.)

Building a business

In addition to letting you upload your videos to satisfy the fun side of your personality, YouTube can work wonders for your business side. You can easily set your account to monetize video content, as mentioned in the next section; as long as you meet the minimum requirements for monetization and enough viewers watch your videos, you can earn some extra money. If you have something to sell or a service to offer, you can also leverage YouTube for some pretty cool and powerful advertising. As you can see in Chapter 12, it's simple enough for anyone to do it.

Monetizing

Years ago, it was a bit complicated and somewhat perplexing to become a YouTube partner so you earned a cut of the money from the ads placed against your videos. If you became a stand-out influencer and personality in fashion and beauty or gaming, you would be earning well enough to quit your day job. And it still works, but many YouTube creators seeking gold came up short, which wasn't necessarily a good thing for many creators and their passionate viewers.

YouTube knew this, too, and over time, continued to improve (and clarify) the YouTube Partner Program (YPP) and expand the monetization options well beyond ad revenue sharing. If your objective is to make money on YouTube as either a full-time job or a side hustle, it behooves you to understand your options. Motivated entrepreneurs get this and are setting up shop in the hopes of striking it big with their YouTube channels.

As you might expect, not everybody will strike it rich. In fact, very few will strike it rich. Nevertheless, you can make money more easily than before with the changes to the YPP discussed in Chapter 13. Our goal is to help you take advantage of the multiple ways you can make money by way of your YouTube channel, including advertising revenue, channel membership, your merchandise shelf, Super Chat and Super Stickers, Super Thanks, Shorts Funds, Channel Memberships, YouTube Premium, and more. Just keep in mind that slow-and-steady wins the race — making money takes time, or at least it will take time until you build a massive following. (For more on monetization, check out Chapter 13.)

Initially, you can earn money with your YouTube channel every time someone views a YouTube ad before watching one of your videos. The more people who view your content, the more money you can potentially make. The minimum eligibility requirements to turn on monetization features for your channel have dramatically changed over the past couple of years, primarily because of what are referred to as brand safety issues with advertisers.

So, what's all this about "brand safety"? Actually, it's not that complicated. An advertiser wants to place their ads on videos that are suitable for their brand image, culture, and vision. An advertiser doesn't want their brands associated with bad press or negative content. What is suitable for one brand advertiser might not be suitable for another brand. For example, a video game manufacturer might be okay with advertising on first-person-shooter videos, but a beauty brand may find that kind of content inappropriate for their video's ads or just not relevant for the target audience. YouTube works hard on brand safety. No matter if you're a creator or a company, you shouldn't lose too much sleep worrying about this.

Partnering

Assuming things are going well, but you feel you're getting bogged down by lots of administration and analysis work around rights management, sales, audience development, production space, and more, you might want to look into validated third-party service companies, known as *Multi-Channel Networks* (MCNs), another important part of the YouTube Ecosystem. The goals of MCNs are to amplify your channel and help you make money. They're not a charity, so they'll be taking a cut of your earnings. You'll need to determine whether it's worth it for you.

Some other considerations for working with MCNs include:

- **Rights management.** There are two types of MCN frameworks, called Affiliate Channels and Owned & Operated Channels. With the latter, you turn over exclusive rights to your channel and content to the MCN.
- **Market focus.** If you're going the MCN route, make sure you find one that understands your market. Someone with gaming channels shouldn't join an MCN that focuses on cooking. In that instance, you'd also have to question how good the MCN is.

REMEMBER

MCNs are independent companies from YouTube, so you have to understand exactly what services they'll be providing you and how they manage payments. As a channel in the MCN, you're not abdicating all your YouTube channel responsibility. You need to hold your potential partner accountable and monitor their obligation to you.

TIP

Before joining an MCN, speak with other YouTube channel owners who are working with that same MCN. Find out what other MCNs they considered and why they chose the one you're looking at.

It's important to note that you don't need an MCN to succeed on YouTube. Most do just fine without them. Regardless of the path you choose, don't lose sight of the content direction — keeping the attention and excitement of your audience.

IN THIS CHAPTER

- Navigating the basics of the YouTube interface
- Watching YouTube videos
- Creating a YouTube account
- Setting up a unique channel URL

Chapter 2

The Basics of YouTube Navigation

In the simplest sense, *YouTube* is a website designed for sharing or viewing video. Even with many people using the YouTube app rather than a web browser on their mobile devices, there's still a common place for all these videos. Before YouTube's founding in 2005, posting and sharing a video online was difficult: The bandwidth and storage needed to stream video were expensive, and many copyright risks were involved in letting people upload whatever they wanted. Because YouTube was willing to absorb the costs and ignore the risks, it provided, for free, the infrastructure for users to upload and view as much video as they want. This proposition turned out to be a popular one.

Google acquired YouTube in 2006, and YouTube's growth continued. Today, viewers watch billions of hours of video per day, and thousands of hours of video are uploaded every minute.

Let us say that last part again: thousands of hours of video are uploaded to YouTube *every minute.*

Given that amount of content, you, as an individual, could never watch everything that's available on YouTube. For every minute of video you watch, you're thousands of hours behind. For every work of genius, such as The Stokes Twins' *BUSTING 100 MYTHS IN 24 HOURS!!,* YouTube has literally millions of poorly shot,

poorly edited videos of family vacations, dance recitals, and bad jokes that could possibly be of interest only to the uploader.

This chapter serves as your (essential) guide to finding the good parts while skipping the bad. (Hey, it's a tough job, but somebody had to do it, and that somebody was us.) We help you navigate the YouTube interface, establish an account, and start looking ahead to planning a channel. If you're new to YouTube, or you need to dig a bit deeper as a user, this is the chapter for you.

What You'll Find on YouTube

You'll find, in a word, videos on YouTube. You'll find, in several words, just about anything on YouTube. We would say that you'll find anything you can imagine, but even we never would have imagined that anyone would make a compilation of animal clips from the long-defunct app Vine, and we definitely would never have imagined that the compilation would have been viewed hundreds of millions of times. The best way to describe what's on YouTube may be to start with a search from the YouTube homepage on either a browser or the YouTube app.

REMEMBER

YouTube is the world's second-largest search engine after Google. With so much content on YouTube, the more specific you are about what you're looking for, the more accurately YouTube will deliver the content.

Managing your identity

Your entire YouTube experience is driven by whether YouTube knows who you are. It doesn't use any magic to figure it out. Instead, YouTube simply determines whether you're logged in or logged out. When you log in, YouTube can make video recommendations based on your viewing behavior. In other words, after YouTube knows what you like, it does its best to bring more of that great video content to you.

REMEMBER

YouTube and its parent, Google, are in the advertising business and are not promoting online video for the betterment of mankind (though some channels on YouTube actually help achieve that goal). By understanding your viewing behavior when you're logged in, YouTube and Google are able to serve better and more relevant ads to you. That's good for them, for the advertiser, and for the viewer. Sure, most people don't like ads, but YouTube is truly trying to do a better job of targeting ads. (Chapter 12 covers this topic in more detail.)

As you can see in this chapter and throughout the book, you need to be logged in to do most of the important things on YouTube. Sure, you can watch videos without being logged in, but you'll miss a good part of the experience. You need a Google account to log in, and we show you how to set up one of those a little later in this chapter, in the section "Working with a YouTube Account." You also have the option to create a YouTube channel for an existing Google account.

REMEMBER

You don't need a YouTube channel to log in to YouTube — you just need a Google account, which we discuss later in this chapter. Having a channel though, as you'll soon find out, helps you capture and store videos, broadcast livestreams, and create YouTube posts to interact with your community without video via images, polls, quizzes, texts, and more.

Navigating the homepage

The homepage of YouTube (`www.youtube.com`) is a fickle beast. It was once the fount of discovery for YouTube viewers. If you were looking for new content, the homepage was the place to be. Over the years, though, YouTube changed (and continues to change) the homepage experience. Many changes have been tied to the company's desire to know its viewers. Viewers who are logged in with accounts and who have a history of using YouTube see videos that might appeal to them based on past usage. New users and those not logged in see the videos that are currently most popular on the site.

The logged-in experience

As long as you're logged in to YouTube when you watch videos, the site is busily keeping track of everything you see and trying to form an idea about what kind of videos you like. This information dynamically drives the homepage you see, and YouTube tries to show you videos that it thinks you'll like. Your homepage will come to be dominated by material that is similar to material you've watched in the past.

Here's a quick tour of what you're likely to see when you log on to `www.youtube.com` after you create an account. (Again, we tell you more about creating an account later in this chapter, in the section "Working with a YouTube Account.") Take a look at Figure 2-1 to see how a YouTube homepage looks when you log in.

Sometimes a picture is worth a thousand words, and sometimes you need a thousand words to explain what that picture is trying to show you. When it comes to the YouTube homepage, you definitely need the thousand words. The list in the following section offers descriptions of what's on the homepage.

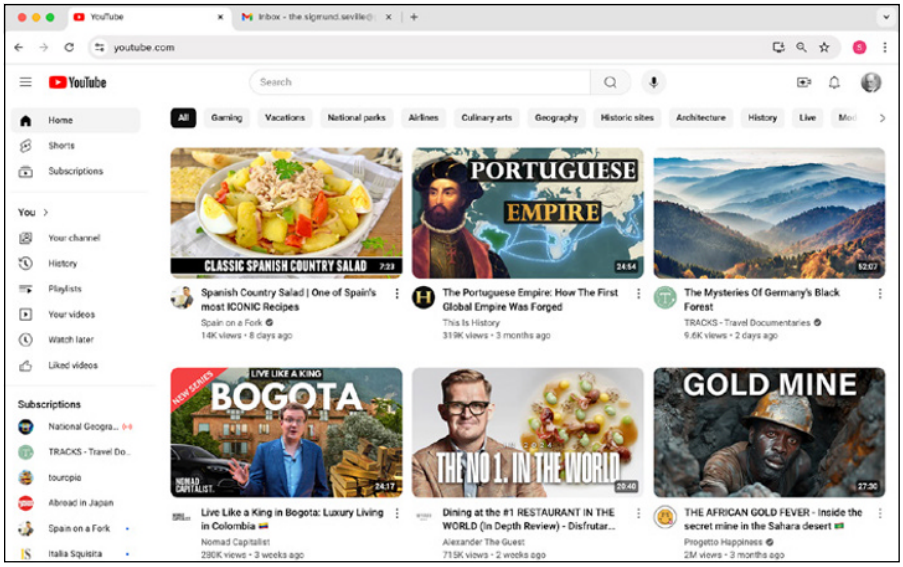

FIGURE 2-1: The logged-in YouTube homepage.

Along the top

Along the top, you'll find YouTube's main controls, and with them, you can access most of the site's essential functions:

- **The Guide icon:** This button, consisting of three horizontal bars, sits next to the YouTube button. Clicking it brings up a guide of your viewing history and engagement, your subscriptions, and lots more to explore on YouTube.
- **The YouTube button:** Though it looks exactly like the YouTube logo, this button actually does something in addition to looking pretty; clicking it always brings you back to the YouTube homepage.
- **The Search bar:** Whenever you need to search for a video, this is where you go. Enter keywords to find videos that may match what you're looking for.
- **The Create icon:** When you're ready to upload a video, you get started by using this camera-shaped button. Clicking it opens a dropdown menu, giving you the option to post a video, do a livestream, or create a post. If you don't have a channel yet, it will ask you to create one. When you click this Create button while in your YouTube Studio (the YouTube Mission Control), two more options become available—New Playlist and New Podcast.
- **The Notifications bell:** Notifications of any activity relevant to your user experience appear here. As a YouTube creator, you're alerted whenever activity happens on your channel, including comments, video sharing, and more. As a viewer who has notifications turned on, you're notified whenever channels upload videos or make posts.

» **Channel icon:** A round image button shows either the Channel icon you come up with or an image associated with your Google account when you're logged in. Use this button to get to YouTube Studio or to configure your YouTube account settings.

TIP

You can log on to YouTube through your Google account, but we recommend having an associated YouTube channel to get all the benefits of your YouTube experience, such as creating videos, capturing shorts, livestreaming, and generating community posts.

Just below the top

Underneath the top row is a narrow row of gray categories buttons dynamically generated from your recent viewing and search behavior. When you click on any of these buttons, YouTube presents a curated list of videos and shorts related to your previous viewing habits. It's a great way to continue your experience with a subject, genre, channel, creator, and more.

Down the left side

TIP

The menu functions running down the left side of the screen complement the functionality of the ones that run across the top and focus more on content. You can toggle what's shown on the left side by clicking the Guide icon. The following sections describe the many options you have from the Guide icon.

HOME

This option is selected by default when you arrive at the YouTube homepage. When this section is selected, the main window of the site shows you lists of channels and videos that YouTube assumes you'll like.

SHORTS

You can discover short-form vertical videos shot on mobile devices that are three minutes or less. Though similar to vertical video content on TikTok and Instagram, shorts take advantage of your overall YouTube viewing experience and your search history. This option presents short-form content relevant to you, rather than simply presenting you with trending content.

SUBSCRIPTIONS

See the most recent uploads for all the channels you've subscribed to, from most recent to oldest. If your channel is new and you haven't subscribed to anyone yet,

this listing displays suggested genres and creators to get you started. Subscriptions are a good way to keep track of the channels you like on YouTube. You can control how your subscriptions are organized on your homepage by using the following tools:

- **Manage:** Clicking this link takes you to a separate page listing all your subscriptions, as shown in Figure 2-2. Here you're given the option to unsubscribe from any channels as well as alter their notification settings. (Notifications are denoted by the Bell icon in the top right of the screen.) You have the choice of All, Personalized, or None. All notifies you of any and all upload activity. Personalized notifies you of only certain uploads, based on a variety of variables, including your watch history. Finally, None turns off all notifications, if you really just don't want to be bothered (or if you just like surprises). You can also unsubscribe in these notification settings.
- **Arrangement:** To the right of Manage are two icons. The leftmost icon, featuring a cluster of six boxes, reconfigures the page to display as a grid, showing only thumbnails, titles, and views. The icon to the right, with three squares and three rectangles, lists all uploads instead, allowing you to view the first part of the video description without having to click the actual video.

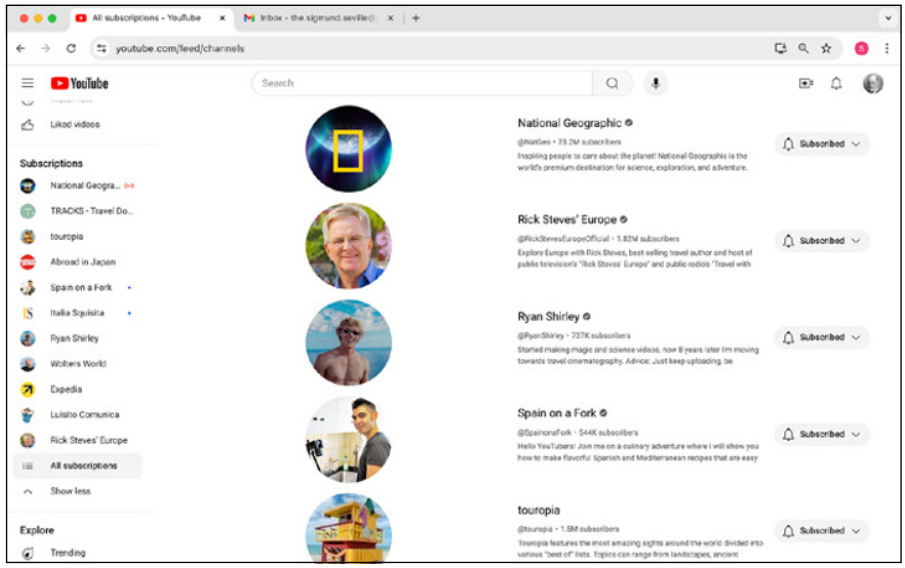

FIGURE 2-2: A list of your subscriptions.

YOU

This option gives you quick, abridged views inside all the other menu functions on the left:

- **Your Channel:** If you have a YouTube channel, you will be taken to your channel just as others would see it. Note that this is *not* your YouTube Studio page.
- **History:** This takes you to a new page cataloging all your account activity, including your watch history, search history, comments, community, and live chat, as shown in Figure 2-3. This page can be deeply embarrassing to visit, because it can reveal to you just how many unboxing videos and various compilations you've watched in the past week. But, whereas this section can lead to feelings of shame and regret for time wasted, it can also be an interesting insight into your viewing.

  You'll end up seeing a lot of videos on YouTube, and at some point you'll want to go back to see what you've viewed or to watch a particular video again. The History section is a great way to keep track of what you've watched and to analyze your viewing.

  YouTube's algorithms pay attention to your watch history when populating the suggested videos on the front page of your account.

TIP

REMEMBER

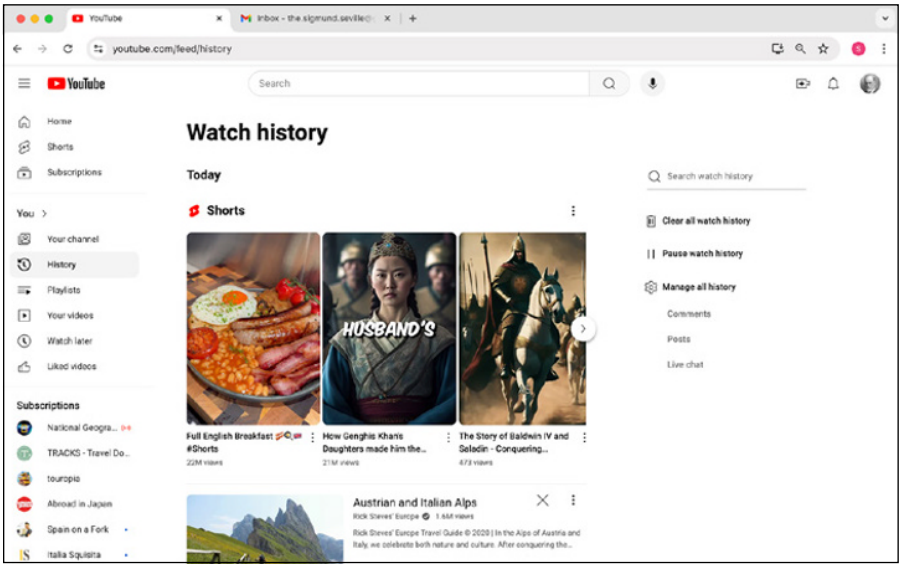

FIGURE 2-3: The Watch History page.

Unlike with real-world history — the stuff recorded in encyclopedias and history books — you do have some control over this list. A few controls here let you "rewrite history," as described in this list:

- *Clear All Watch History:* This is the nuclear option. If you're ready to undo everything you've ever watched and start over with a clean slate, this does just what it says and deletes all the information from your watch history. If you don't want to clear your whole watch history, you can also delete individual videos on a case-by-case basis by hovering the cursor over the videos and clicking the X that appears.
- *Pause Watch History:* This puts your memory on hold and allows you to watch videos without being added to either your history or your video recommendations from YouTube. If you know that you're about to binge-watch a bunch of funny animal videos and don't want to be recommended videos like these, this is the option to select. Of course, this strategy works only if you pause before you watch the videos. Otherwise, you'll be in there clearing out your watch history before you know it.
- *Manage All History:* This takes you to a separate page that allows you to access more info about your account's activity, including reviewing YouTube searches you've conducted. This is helpful when you forget to save a video, and you want to reconstruct the search history. Clickable links allow you to instantly return to the YouTube search results for that query. You can also access various other activity settings associated with your Google account, including managing ads your receive.
- *Comments, Posts, and Live Chats:* All of these additional links take you to Google My Activity, where Google helps you manage your community interaction across YouTube and other digital places on the web.

» **Playlists:** Playlists are a great way to organize videos you've discovered on YouTube. This section highlights all of your playlists, if and when you've made them, and whether or not they're public. We go into more detail about playlists and their importance in Chapter 3. You can easily add videos to a playlist as described in the following list:

- *Add Videos:* If you hover the cursor over a video thumbnail, a clock-shaped icon appears. Clicking this icon automatically adds a video to your Watch Later playlist. Or if you're watching a video but don't have time to finish it, you can save it to your Watch Later playlist (as discussed later in this chapter, in the section "Watching a Video"). A playlist is useful for organizing the videos you like or want to watch later. For example, you can collect all the Taylor Swift videos you've watched into one music powerhouse playlist. A playlist is also a great way to engage viewers with your content. (For more on how content engages viewers, see Chapter 3.)

TIP

Hovering over a video thumbnail also reveals a secondary button, Add to Queue. If you want to watch a series of videos back-to-back in one session without adding them to a playlist, use this button to queue them up so that they play, one after the other, without interruption.

- *Remove Videos:* When you hover over a video, you see a small icon on the right, composed of a row of three small dots. Clicking this icon opens a dropdown menu that gives you the option to remove the video from your Watch Later playlist. (This function applies to other playlists as well.) This is a great way to clean out your Watch Later playlist if it's getting tedious. You can also move a video to the top or bottom of the list, add it to the queue, or add it to a more unique playlist. You can also rearrange the play order of the videos on your list by hovering over the two lines on the left of each video, clicking, and then dragging.

REMEMBER

If an uploader deletes a video, it's automatically removed from any and all of your playlists.

- *Play All:* This option allows you to play all videos on the Watch Later playlist as they appear. However, if you want to spice things up, you can set it to Shuffle.

- **Your Videos:** Similar to the "Your Channel" link, this link will show up only if you have a YouTube channel. However, unlike the other link just discussed, this will take you to your video list in YouTube Studio, where you can view your videos, shorts, livestreams, posts, playlists, podcasts, and promotions.
- **Watch Later:** Videos you've flagged for viewing at a later time can be found using the clock-shaped icon. Think of this as another playlist, except that it's always private. The Watch Later link opens a new page that shows you a private playlist of all the videos you've chosen to watch at a later time. Your channel subscribers can't see this playlist. After you've watched the content, you can quickly remove it from the playlist or add it to another playlist. If you use a streaming device attached to your TV, this can be your TV line-up queue for the evening. You can easily add videos to the Watch Later playlist — or any playlist, for that matter — as described in the following list:
- **Liked Videos:** Any videos you *like* (covered later in the chapter, in the section "Watching a Video") will populate on this automatically generated playlist. It functions in exactly the same capacity as your Watch Later playlist, except that videos are added whenever you click to like them.
- **Your Clips:** YouTube Clips are a 5- to 60-second section of a YouTube video or a livestream you create by clicking the Clip button on the YouTube Watch page, which we describe later in this chapter. This link appears only if you've set up your own YouTube channel.

SUBSCRIPTIONS

Not to be confused with the previous Subscriptions button, this section lists the channels you're subscribed to and denotes, with a small blue dot, whether you've seen their most recent activity. Clicking any of the subscriptions takes you straight to that channel.

EXPLORE

This option gives you quick, abridged views inside all the other menu functions on the left.

- **Trending:** Hot videos, music, gaming, movies.
- **Shopping:** Shorts and standard videos with promotion and purchase options.
- **Music:** Playlists and videos around trends, moods, and current topics.
- **Movies & TV:** Movies, shows, sports, online channels, with purchase and ad options.
- **Live:** Livestreams across a variety of topics, including news, gaming, talk shows, and more.
- **Gaming:** Live, curated, or trending content around gaming.
- **News:** Both top stories and genres around business, sports, technology, health, and more.
- **Sports:** Not just live sports, but highlight reels, previous games, and athlete commentary.
- **Courses:** Free and paid content to expand your knowledge.
- **Fashion & Beauty:** Events, galas, collections, and everything else to make you stand out.
- **Podcasts:** Popular, live, or recommended podcasts across diverse topics.
- **Playables:** Tons of different games to keep you endlessly occupied.

REMEMBER

You may have now seen in the Guide more than a few references to subscriptions. Subscriptions and subscription management are a big deal on YouTube because they serve to support a strong connection between a viewer and a channel.

MORE FROM YOUTUBE

This list gives you quick access to some popular features and video categories:

- **YouTube Premium:** This paid-subscription service lets you view YouTube without ads, play videos in the background of your phone or mobile device, access exclusive original content, and download content, including on YouTube Music's app.
- **YouTube Studio:** If you've created a channel, this is where all the creative magic and management happens. And this is where you manage all those videos you created. There are a few ways to navigate to your Studio; this is one shortcut.
- **YouTube TV:** This is a paid television streaming service for local news, shows, sports, and more. Many cord cutters have switched to streaming live TV through YouTube TV and other live TV providers.
- **YouTube Music:** This is a music streaming service much like Spotify or Apple Music. The free version is ad-sponsored, but the paid plan ditches the commercials and ads.
- **YouTube Kids:** This is a protected environment, also available as an app on Google Play or Apple's App Store. Both web and app have parental controls that you can tailor for each child. It provides a safer experience for kids and access to family-friendly videos.

SETTINGS

This link takes you to an administration page where you can manage one or more YouTube channels and the associated Google accounts. Also on this page are settings that allow YouTube to notify you about activity and engagement around your channels and video. There are also other settings around privacy and billing, too.

TIP

YouTube allows you to have more than one channel associated with your Google Account. Settings is where you can add and manage all your exciting channels in one place.

REPORT HISTORY

With so much content on YouTube, there's always a chance that some content that violates YouTube's Community Guidelines gets through. This page displays violations that you've reported.

WHY DOES YOUTUBE HAVE ADS?

It's always flattering when people listen to you and seem to be interested in knowing exactly who you are. You might think that YouTube is an avid listener just because it takes a great interest in the kinds of videos you're watching, but that's not because YouTube has suddenly decided you two should be Best Friends Forever. The truth is that YouTube's *product* — the way it makes money — is *not* streaming video. In fact, the streaming video part costs the company quite a bit of money because it's expensive for it to host all the videos you made of your dog's bath.

So, if YouTube isn't making money hosting and serving videos, how is it making money? Here's the dirty secret: *It's making money selling advertisements!* That means *you* are YouTube's product. It's selling your attention to advertisers, and that's why YouTube wants so badly to know you. It wants to be able to tell its ad-buying customers exactly who is watching their ads.

Though all this information may seem to be much like part of a dystopian police state, it turns out that it's something that can work in your favor when you launch a channel with an eye toward making money from your content. We get to the details of grabbing your share of YouTube ad revenue in Chapter 12.

HELP

YouTube changes every day, and even with the terrific book in your hands, you may need to search for other things. Here is your starting point.

SEND FEEDBACK

Is there something about YouTube you really like? Or don't? Well, here's your place to let the team at YouTube know.

The logged-out experience

When you arrive at YouTube before you've taken the trouble to create an account, you see the platform at its minimum. YouTube is waiting for you to show where you want to go. You can also skip the search and explore what's trending, watch some sports, or simply go shopping. In any case, you're signaling to YouTube what you're interested in. Figure 2-4 shows what YouTube looks like to the user who is logged out.

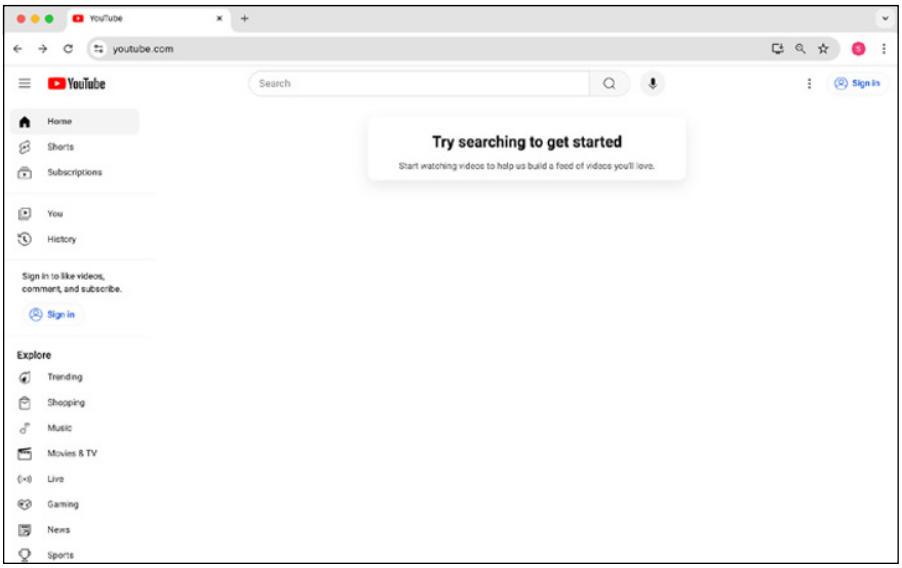

FIGURE 2-4: The logged-out YouTube homepage.

On the top of the screen is a prompt for you to begin a search. On left side of the screen, scroll down and you'll see the Explore section discussed previously, which includes lots a great content, courses, gaming, and more right off the bat. Note, however, that until you log in, your preferences won't be saved and the personalized options on the left side won't be visible. In other words, the You section won't have anything. Create that account and log in to experience YouTube at its finest.

TIP

You can get a look at the homepage at any time without all the baggage of your past video views. That way, you'll be sure to see (unfiltered) what's trending on the site. Just put your browser in a private browsing mode, such as Chrome's Incognito option, and you'll see the YouTube homepage with new eyes. You'll see which videos are hot on the site in the Explore section without the context of your past browsing.

REMEMBER

In Apple's Safari browser and Mozilla Firefox, incognito browsing is called *private browsing.* In Microsoft Edge, it's called *InPrivate browsing.*

Watching a Video

The reason that most people visit YouTube is to watch videos. That should probably be one of the first things you do when you arrive. After familiarizing yourself with the homepage, try clicking on a video. You're taken to a Watch page, which should look a lot like the one shown in Figure 2-5.

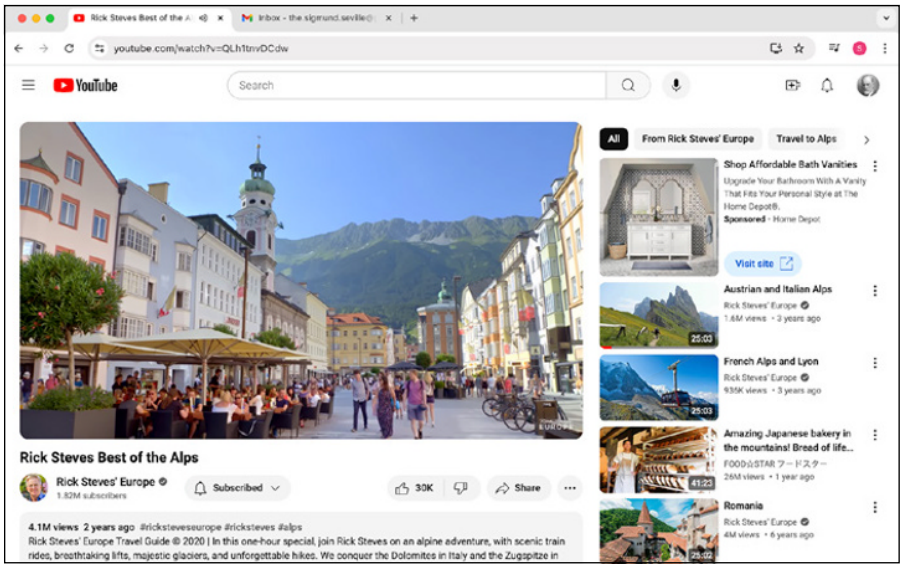

FIGURE 2-5: The Watch page.

The Watch page is, first and foremost, for viewing videos, but it has a number of other functions as well. You'll want to become familiar with a number of elements on this page:

- **Video Player:** Front and center is the video player, which you use to watch the video.
- **Video Info and Description:** Tucked beneath the video player you'll see the video info, including its title, view counter, video publish date, description, and optional shopping fields.
- **Comments:** Everybody has an opinion, right? What's true about the world outside is equally true in the world of YouTube. Here's where viewers can comment on and discuss the video, and where the uploader occasionally joins in the discussion.
- **Suggestions:** Along the right side of the screen are the suggested videos, which are YouTube's best guesses about what you might want to watch next, based on the video you're watching and your overall watch history.

That's the bird's-eye view. The next few sections take a closer look at some of these features in a bit more detail.

TIP

Much of this book focuses on browser-based use of YouTube. This in no way diminishes the use of the YouTube app available for iOS and Android devices. In fact, we watch as many videos on the app as we do in the browsers. Generally, the web-based version has the full functionality, so for everything you find on the app, you'll find even more on the browser, along with similar icons.

TECHNICAL STUFF

The YouTube *algorithm*, the mysterious piece of code responsible for guessing what you want to watch next, is uncannily effective a lot of the time. The suggested videos can suck you into what is known as the YouTube spiral, in which you can potentially lose hours of your life clicking on video after video and eventually end up watching infomercials from the mid-1980s with no clear idea how you got there.

The player

The most noticeable item on the Watch page is the video player. As with most video players, the YouTube version has a number of controls ranging along the bottom. Here's an overview of what each control does:

- **The scrubber:** This bar, which runs the length of the video player, allows the viewer to jump around in the video. Hover the mouse cursor over the bar, and then click on the red circle and drag it to the right to "scrub" forward in the video.
- **The Play/Pause button:** This button stops and starts the video stream.
- **The Next button:** This button allows the viewer to skip to the next video. Next can mean a recommended video from YouTube or the subsequent video if watching a playlist.
- **The mute/volume control:** When you roll over the Speaker symbol, the volume bar appears. Click the speaker to mute the audio. Use the volume slider to adjust the volume.
- **The counter:** This is the timer for the video. It shows you how much viewing time has elapsed as well as the total length of the video.
- **The Autoplay toggle:** When shifted to the right, this allows the video to begin automatically. Otherwise, you'll have to manually click the play button.
- **Subtitles/closed captions:** This button, marked CC, toggles the captions (on-screen text of the dialogue and sounds) on and off. Not every video has good captions. (For more on captions — good, bad, and indifferent — check out Chapter 8.)
- **Settings:** You have to click the little Gear icon to access the Settings menu, but that's not too hard to do. For most videos, the available settings include stabilizing the volume, turning annotations on and off (graphics superimposed on the video), changing the video speed, switching subtitles and

captioning, and setting the resolution of the video. We're big fans of watching the videos at normal speed and at the highest available resolution.

- **Display Controls:** You can change the size of the default player to become smaller so that you can continue to browse the site (miniplayer), show across the width of the browser (theater mode), cast to a compatible television or device (play on TV), or take over the entire display (full screen).

TIP

When it comes to resolution, most videos don't default to 1080p or 720p HD. The default playback is often 480p or lower, which doesn't look that great. If you want to watch videos in high definition, you have to become familiar with the Settings menu. Keep in mind that your Internet connection needs to be fast enough to stream HD video to avoid interruption.

TIP

This is one of the instances where the YouTube app has some added functionality. If you're in a room with AirPlay, Bluetooth, or other types of intelligent devices, you can stream from your mobile device directly to a bigger screen. Additionally, you can download the video into the app, but you'll need a special, paid subscription to do this.

The video info section

Directly below the video player, you'll find a bunch of information about the video that we usually call the *video info*. You can see a lot of data about each video there, as you can see in Figure 2-6.

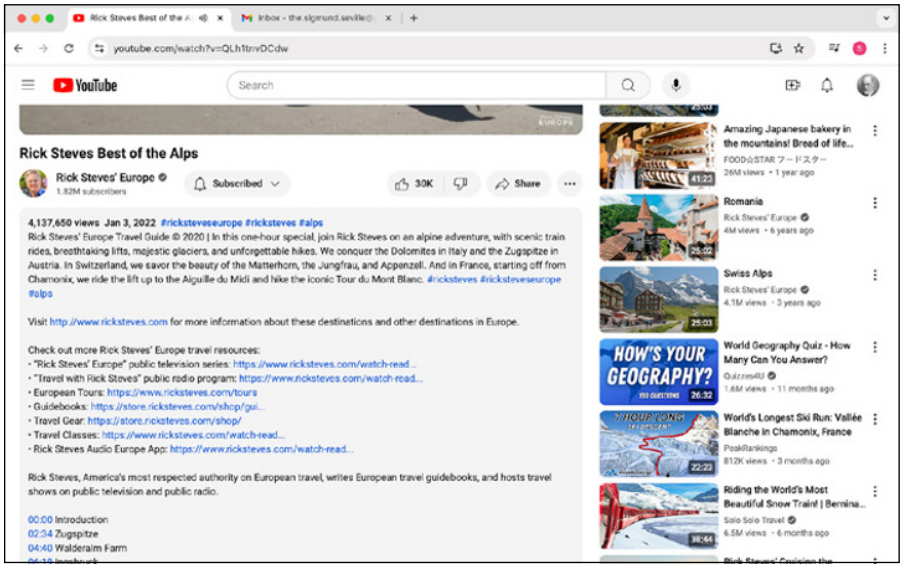

FIGURE 2-6: The video info section.

Here's a list of the most important information to pay attention to in the video info:

- **Title:** In large type just below the video player is the title of the video. (We talk more about titles — more effective titles, to be specific — in Chapter 8. For now, think "catchy and relevant.")
- **Channel information:** Just below the title, you'll find the channel name and a logo known as the Channel icon. A small check mark appears next to the channel name if it's *verified,* meaning a person or brand behind the account is the real deal. If you see a musical note next to the channel name, it's an "Official Artist Channel" (OAC), which requires an entire process for eligibility. The subscriber count appears below the channel name.
- **Subscription status and control:** In Chapter 8, you discover that subscriptions are important to creators and viewers because subscriptions provide a better level of engagement among the two. The Subscribe button, which is to the right of the Channel icon, appears in black. Simply clicking the button enables the subscription, and the button turns gray while adding a secondary subscription setting button that looks like a gear. Click this secondary button to control how you want to receive updates from the channel. To unsubscribe from a channel, all you need to do is click the gray Subscribed button, then click Unsubscribe from the popup window that appears.
- **Like or Dislike:** The Thumbs Up and Thumbs Down buttons give you a quick, simple way to let your feelings about a video be known. Just to be clear, click the Thumbs Up button if you like the video; click the Thumbs Down if you don't.
- **Share:** Next up is the Share link. When you click the Share link, you're shown a few different ways that you can share the video and entice the world to look at it. Don't forget that YouTube is also a social media platform that's quite capable of letting you easily share to WhatsApp, Facebook, X, email, and other sites. YouTube also lets you share video on a website with simple HTML embed code, and if that's not your style, you can simply email a video link to your friends.
- **Download:** Heading into the mountains or to another place where the WiFi isn't so good? Well, the good news is that you can download videos, but you're going need to a YouTube Premium plan, which you'll have to pay for.
- **Thanks:** Also known as "Super Thanks," this optional button may appear on some channels. We cover this in later chapters on monetization, but understand that this is an advanced feature only available to a limited number of creators.
- **Save:** Over time, you'll want to keep track and organize the videos you're viewing. If you're using YouTube videos to help you with a kitchen renovation, you may want to keep all the videos about cabinet installation in one place.

That place is playlists, and you learn about them in Chapter 3. You can save a list of all the videos you want to watch later or videos that are your favorites.

- **Clips:** YouTube Clips are a 5- to 60-second section of a YouTube video or a livestream you create by clicking the Clip button the YouTube Watch page. This link will appear only if you've set up your own YouTube channel. Clicking on Clips will bring up an advanced scrubber that allows you to select, title, and share your clip.

REMEMBER

You can only clip videos if the content owner allows you to do so. If there's no clip button on the YouTube Watch page, then the creator decided that clipping is not allowed.

TIP

As a YouTube viewer, clips are a terrific way to filter and organize content. Think about how many times you've gone back to a saved video and searched back-and-forth for that one nugget. As a content creator, clips allow your community to socialize your content while providing you with valuable insights into what your audience is looking for.

- **More:** This catch-all button — the one with the three dots (. . .) — lets you see more information about the video. This may include some of the buttons described in this list if they're not visible. Here, you can also report this video to YouTube if you see inappropriate content. This last piece should be used only sparingly.

The video summary section

Directly below the video info section, you'll find a bunch of information about the video itself that we usually call the *video summary*. You can see a lot of data about each video there, as you can see in Figure 2-6. You can expand the video summary section simply by clicking the . . . more link. The section contains:

TIP

- **View Count:** The number of views that the video received.

  Exactly what counts as a view on YouTube is one of the most debated metrics on the platform. Generally, when a user initiates and watches a video for a certain amount of time, which is also speculative but we can assume 30 seconds, that is a view.

WARNING

  Don't try to "game" views by creating thousands of views on your own videos by replaying it. In fact, YouTube will probably penalize you.

- **Time Since Publish Date:** This shows how long ago this video was published. If you hover over this, the exact date of publishing will appear.

» **Description:** The video description field provides all sorts of helpful information about the video and a way for viewers to find additional information, which may include links to make a purchase or support a political candidate, for example. This section has grown significantly since the last edition, and may include Shorts that remix the video, as well as lyrics, transcripts, and more channel information. Only part of the description is shown, so you can click the . . . more link under the description summary to see the rest of the information. Chapter 7 explains how to best organize the description field.

The shopping section

Directly below the video summary section, you may find an optional row, also known as the "merch shelf," containing products being sold by the creator or artist. With changes to the YouTube Partner Program (YPP), creators and businesses can earn money here selling before they reach the advanced tier of the YPP when they can profit from ad revenue. This section also represents an opportunity for YouTube channel owners to establish some important brand partnerships. We cover more of this in Chapter 13.

The comments section

The final section on the Watch page is the notorious comments section. Comments about the video are placed just below the description field and can be sorted according to popularity or recency. Regular YouTubers know that comments can range from highly informative or supportive to occasionally pretty rude. Remember that YouTube is a social media platform and with it comes the good, the bad, and the ugly — especially in the comments section. Many viewers consider the comments section frequently as more important than the video itself. As a creator, you definitely want to attract comments, but keep in mind that you can filter out inappropriate ones or ban specific viewers who only cause trouble. Be sure to read the comments and respond appropriately.

Working with a YouTube Account

There are a number of reasons to establish a YouTube account. Though the logged-out experience is interesting, you need an account to subscribe to channels, create playlists, comment on videos, and generally become part of the YouTube community. Not to mention, you need an account to launch your channel, where you upload videos, run ads on those videos, and generate some revenue.

REMEMBER

Be aware that signing up for a YouTube account means signing up for a Google account. Google owns YouTube, and recently Google has been busy unifying its products under a single login, allowing you to use one username and password to log in to its complementary services — like Gmail, Google Drive, Calendar, and Maps — in addition to your new YouTube account. Note that when you create a Google account, you can create a Gmail address or associate it with your non-Gmail address.

Getting an account

One of the first things you notice when you arrive on the YouTube homepage is the Sign In button in the top right of the screen. Google and YouTube want you logged in so they can monitor your viewing habits and provide more focused video recommendations and — ultimately — relevant advertising. If you already have a Google account and you want to use it to house your channel, you can. If you're creating a new channel, it may make sense to create a new Google account to go with it.

WARNING

You'll use this channel as your business, and you should, as the popular idiom goes, "never mix business with pleasure." Though not always 100 percent true — many people have jobs they truly enjoy — this statement definitely applies in this case. If you take to heart all the principles in this book and have a bit of luck, your channel could become quite popular. You'll then be in the unenviable position of running your new online video business in your personal email account, and you'll be stuck with the job of sifting through the guilt-inducing emails from your mother, the advertisement for the big sale at the store where you bought a gift for your ex once (like 12 years ago), and, of course, messages that might actually be important. Rather than deal with that hassle, just go ahead and start a new account. It's free.

Follow these steps to get a Google account you can use on YouTube:

1. **Click the blue Sign In button on YouTube.**

   Doing so takes you to the Google login screen, shown in Figure 2-7, where you can log in or create a new account.

REMEMBER

Last time we checked, the Sign In button was in the top right of the screen, but be aware that YouTube, like all other websites, tends to redesign things and move buttons around from time to time.

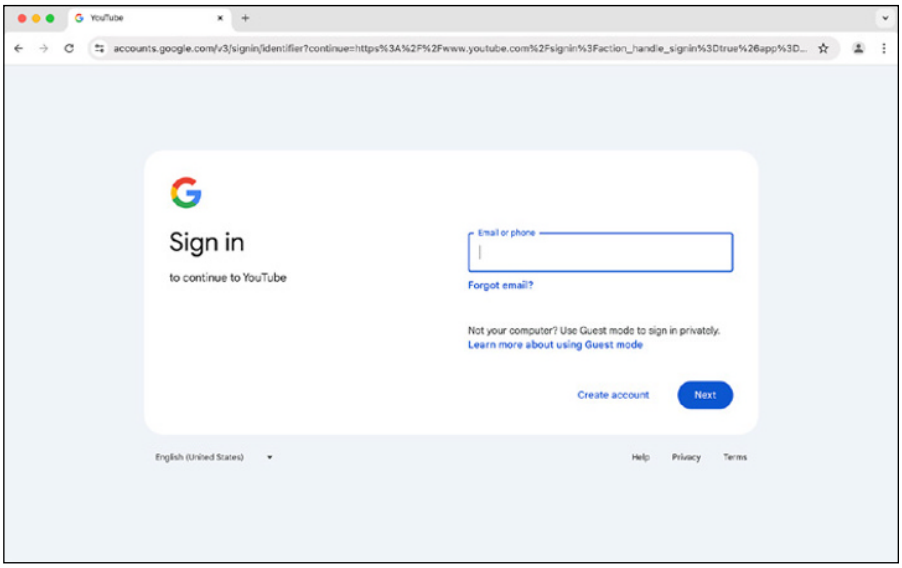

FIGURE 2-7: The Google login screen.

REMEMBER

Many desktop and mobile browsers allow you to log in to record browsing history, create bookmarks, and save user IDs and passwords. That will work with YouTube as well, but you need to remember that unless you're using the Chrome browser, the Google login for YouTube may be different from your login on Safari, Firefox, and Edge.

TIP

If you already have a Google account, you may already be logged in. If you're creating a new account to go with a new channel, it may help to use a private browsing mode in your web browser to avoid confusing Google.

2. **Click the Create Account link, below the Username and Password fields.**

   Doing so yields a popup with three options, shown in Figure 2-8: For My Personal Use, For My Child, and For Work or My Business. Though the account-making process is identical for both, the latter enables the Business Personalization setting, allowing Google to target ads toward you that it thinks will help your business. Unless you want to receive marketing tailored toward your business, going with For My Personal Use is just fine.

3. **Fill in the necessary information.**

   The fields shown in Figure 2-9 are much like what you'd expect. The name you enter is the one associated with your account. You can use either your real name or a made-up name that reflects your account. Just be aware that the name functions as the public face of your channel, so sophomoric attempts at humor are probably not the way to go.

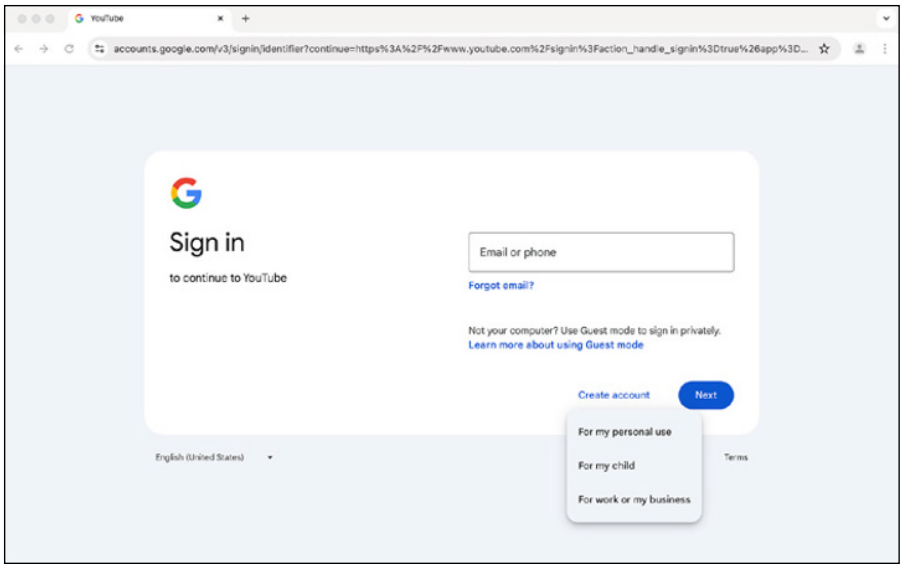

FIGURE 2-8: Choosing the type of account.

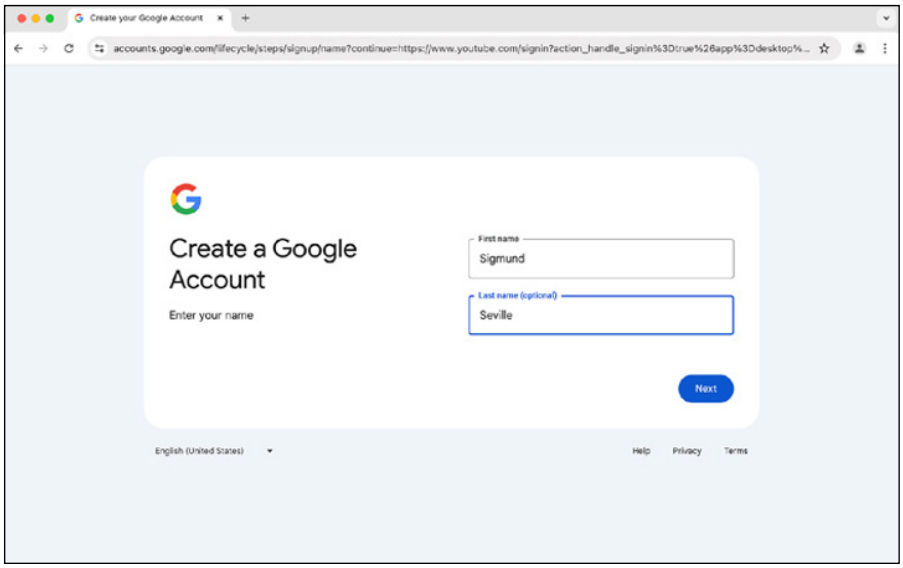

FIGURE 2-9: Creating your Google account.

4. **Click Next.**

5. **In the new dialog box that appears (see Figure 2-10), enter the following personal details:**

   - **Birthday:** No ifs, ands, or buts — you need to choose a birthdate. You may not want to show your real age, what with YouTube largely being a young person's game, but we won't encourage you to lie.

TIP

If you're going to be a smart-aleck and decide to give the age of your channel rather than your own age, make the age at least 18. Some content on YouTube has age restrictions, and giving your channel a birthdate that makes it less than 18 years old can come back to bite you.

- **Gender:** Gender is truly up to you. Personally, when we're creating business accounts, we usually choose Rather Not Say because we think of the channels as an inanimate object.

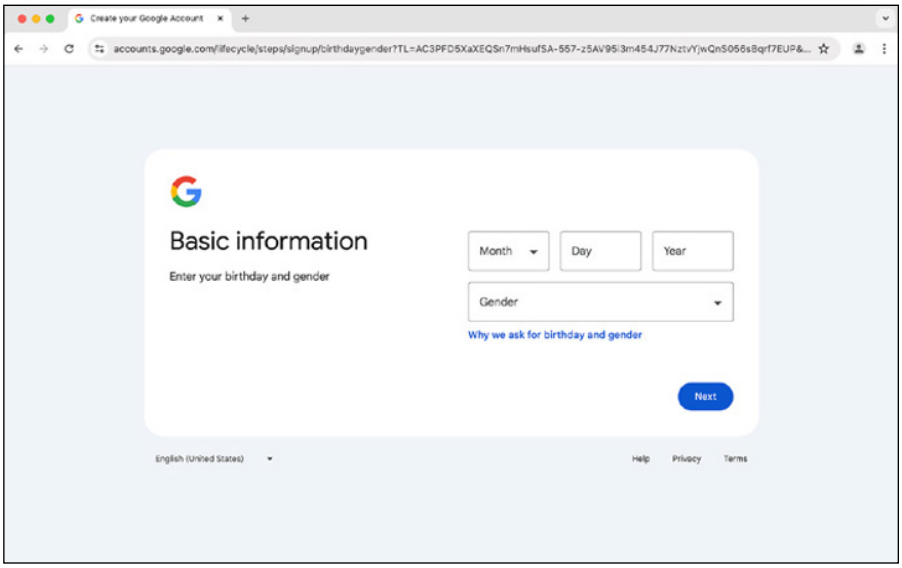

FIGURE 2-10: Enter your personal details.

6. **Click Next.**

7. **In the new dialog box that appears (see Figure 2-11), enter your Gmail address or create a new one.**

   You only have to do this if you're creating a new account. If you have an existing account that's not a Google-managed account (not `gmail.com`), that's okay. You just have to click Use Your Existing Email and Google will send you a verification to confirm that you own this email.

   We recommend creating a new Gmail address when setting a new account, instead of using your current email address. It makes all your YouTube work easier. Below this field is a link that offers the option to create a new Gmail account.

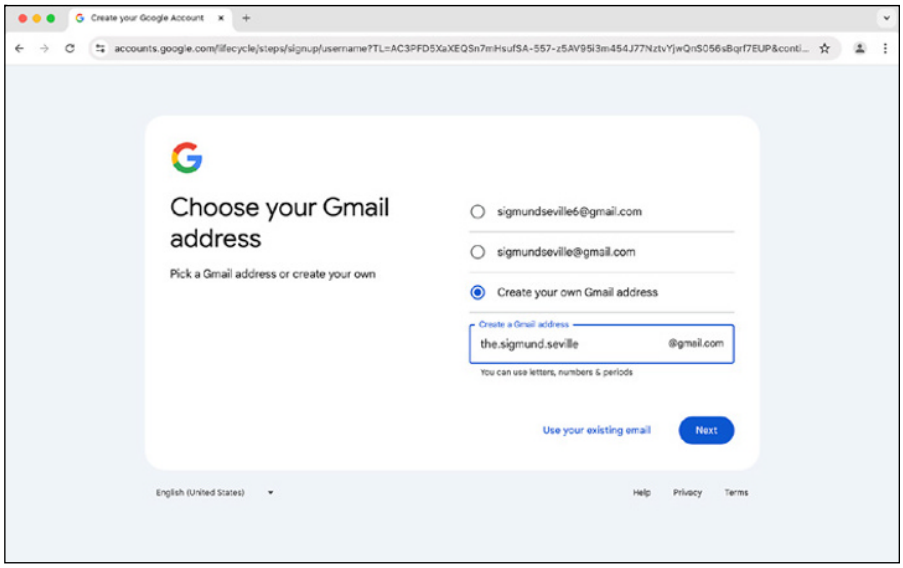

FIGURE 2-11: Select a Gmail address.

8. **Click Next.**

9. **In the new dialog box that appears (see Figure 2-12), enter a password.**

   You've probably done the Create a Password and Confirm Your Password song-and-dance a thousand times before, so we don't offer any advice other than to recommend that you follow the sound password tips that Google offers during this process.

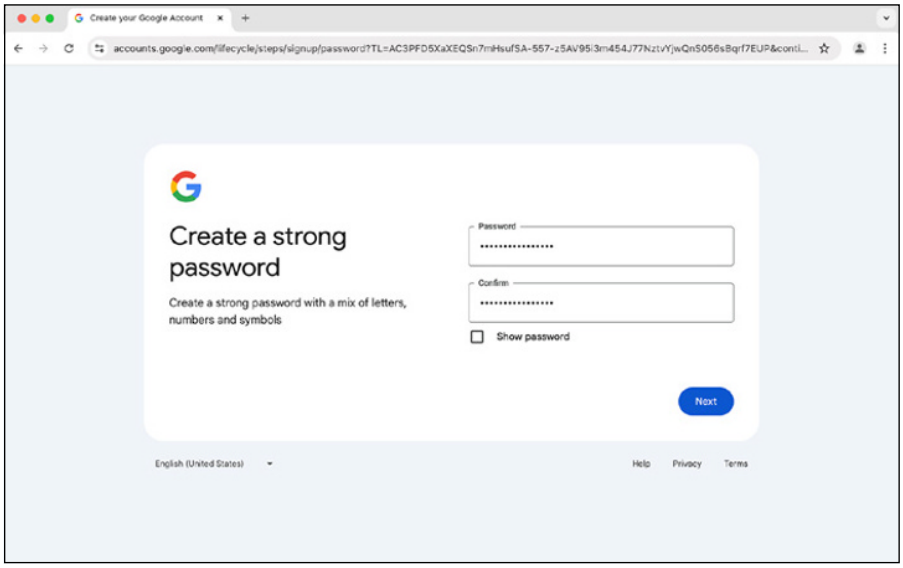

FIGURE 2-12: Enter a password.

10. **Click Next.**

11. **Google may prompt you for a phone number.**

    If you're asked for phone number, Google wants to confirm you're not a robot. Enter the phone number.

12. **Click Next.**

13. **Enter the code texted to your phone and click Next.**

14. **In the next dialog box that appears (see Figure 2-13), enter a recovery email address.**

    You have an option to skip this, but don't. We all lose or forget passwords, and this is the best way to recover your account in case that happens.

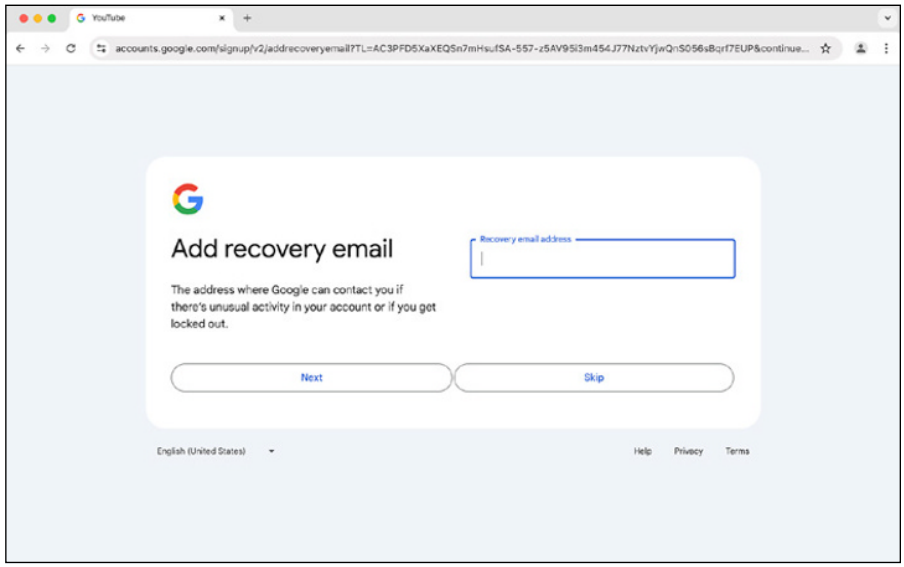

FIGURE 2-13: Provide a recovery email.

15. **Click Next.**

16. **Verify the data and then click Next.**

17. **In the new dialog box that appears (see Figure 2-14), scroll to the bottom and click the I Agree button to agree to Google's terms-and-services agreement.**

    This is the requisite "fine print." We'll leave it to you and your legal representation to decide whether you're comfortable with it.

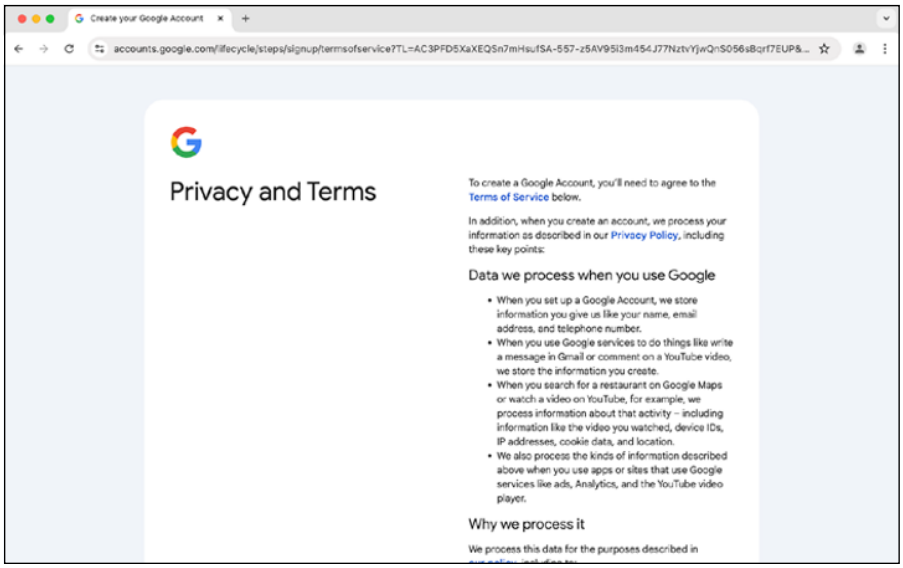

FIGURE 2-14: YouTube's terms-and-services agreement.

18. In the popup box for Confirm Personalization that appears (see Figure 2-15), click Confirm.

Google wants to give you more control over all their provided services, including YouTube, in one place. This includes web and app activity such as Search, Maps, and more. Don't worry too much about this because you can always come back and adjust it later through the Google account you created.

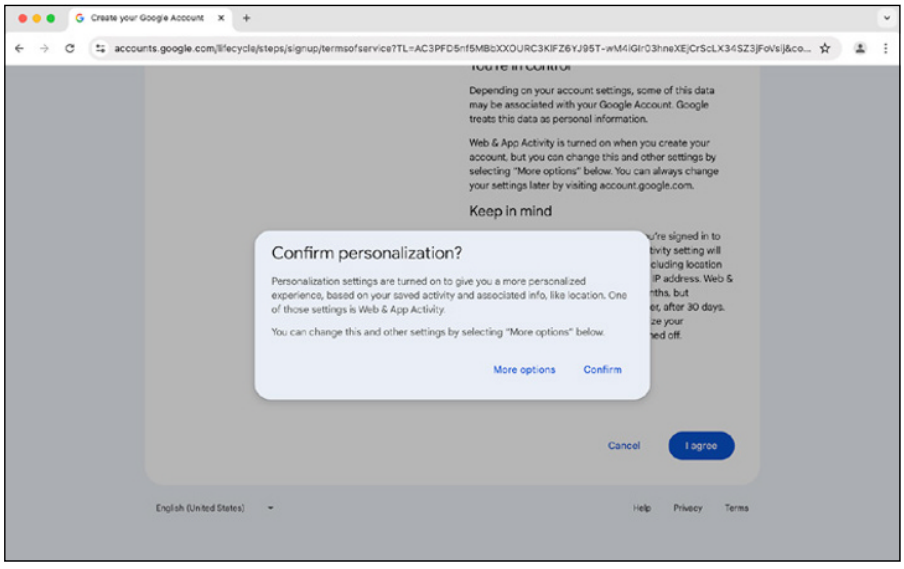

FIGURE 2-15: Confirm personalization settings.

19. **Congratulations! You're now logged in to YouTube.**

    You will now be on a screen similar to the one you saw in Figure 2-4, except that you'll see a round, logged in channel icon with a letter or thumbnail in the top-right rather than an oval Sign in button.

Logging on to your YouTube account

If you have completed all the steps to set up your YouTube account, you should be logged on to the YouTube site automatically. (You may need to click the Sign In button to be automatically logged in.) If that doesn't happen, the first thing to do is follow these steps to log in with the account you created:

1. **Click the Sign In button at the top of the YouTube main screen.**

   You're taken once again to the Google Sign In screen (refer to Figure 2-8) and prompted to enter your account details.

2. **Sign in with the email address and password you used when creating your account.**

At this point, you're logged in to YouTube but don't yet have your channel set up. We cover that topic in the next chapter.

IN THIS CHAPTER

- Creating a YouTube channel
- Navigating your new channel
- Customizing your channel
- Making your channel viewer-friendly

Chapter 3
Building Your Channel from the Ground Up

A YouTube Channel is where the creator can track activity, maintain account settings, and — most importantly for a creator like you — upload videos. The ability to find your way around your channel and understand the different features that YouTube offers is essential to building your audience, and [drumroll, please] obtaining revenue.

Creating a YouTube Channel

Building a channel is what you came here to do, and now it's time to get to it. You can do the work to set up your channel after you've logged on to YouTube with a Google account. After that's done, follow these steps to get your channel off the ground:

1. **Log on to YouTube and click the round, logged in channel icon in the top right to bring up the YouTube Studio and YouTube Settings pull-down menu, as shown in Figure 3-1.**

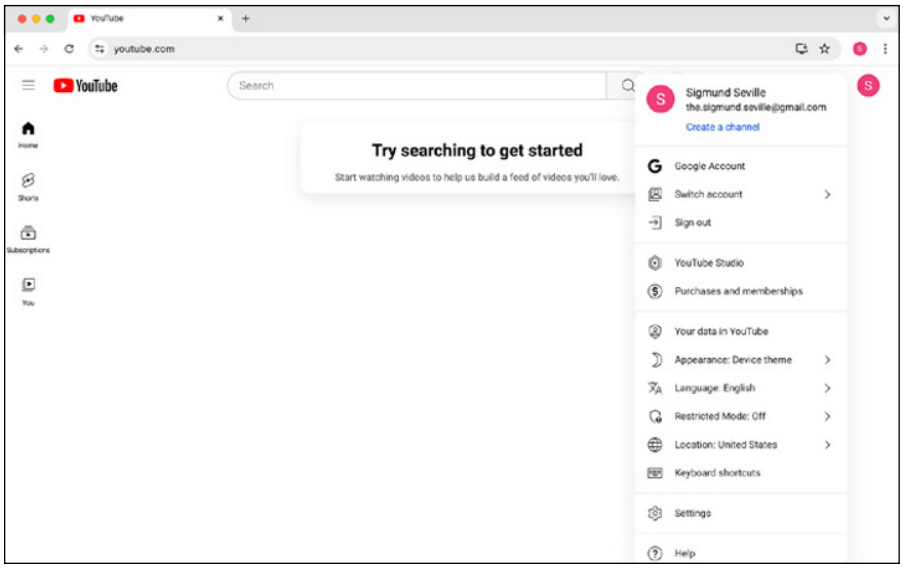

FIGURE 3-1: The YouTube Studio and YouTube Settings pulldown menu.

2. Choose the Create a Channel option from the very top of the pull-down menu (usually shown in blue).

A dialog box appears, with How You'll Appear across the top, as shown in Figure 3-2.

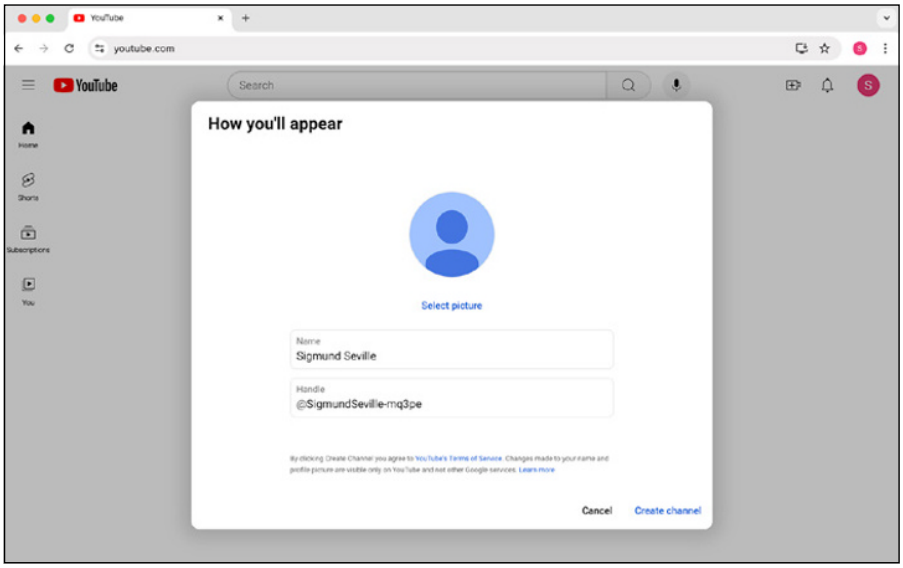

FIGURE 3-2: Setting up your appearance.

3. **In the new dialog box that appears, choose the Name, Handle, and Profile Picture you want to use for your channel.**

At this point, whether you've decided to stick with your own name or come up with an original one, you have the option to set up some crucial details about your channel. Don't skip this task — it makes your channel more visible and accessible to others:

- **Upload a profile picture:** This is the avatar for your channel (see Figure 3-3). Whether someone is on your page or reading a comment you've made, this is who they'll see. You can select from a gallery that YouTube provides or you can upload your own from your computer. We suggest you use your own and that it aligns with your brand. As long as it adheres to the correct dimensions and community guidelines, it can be anything you want.

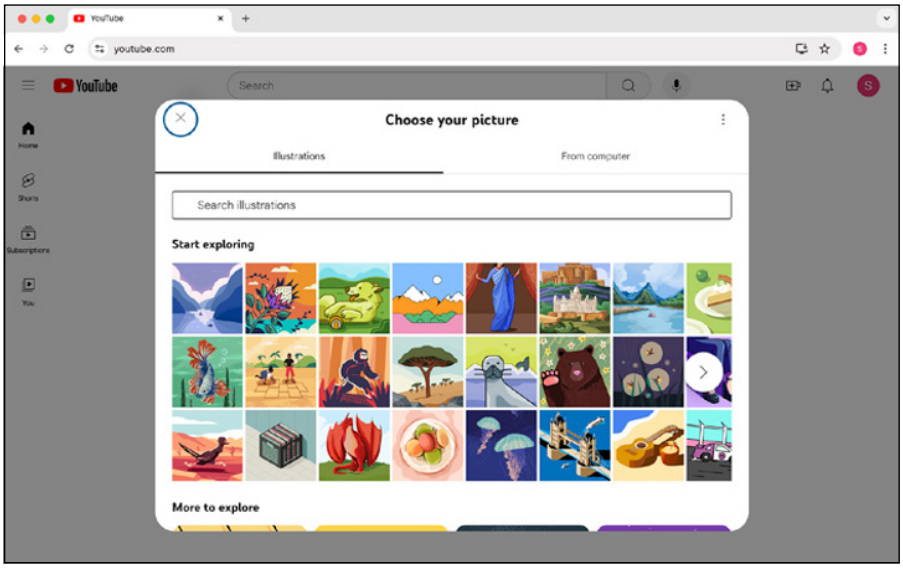

FIGURE 3-3: Choosing your picture.

- **Add a channel name:** Sometimes it's okay to use your real name for your channel. If your content is personality-based (a vlog based around you, for example), this can work just fine. If that's the way you want to go, just click Select under that option and be done with it. However, if you want to go by a different name or are creating a channel for your business, we recommend creating a custom name.
- **Create your handle:** Handles are new since the last edition of this book and were created as a better way to find and engage with creators and brands. You'll see them on YouTube channel pages and on Shorts. We recommend a handle that aligns with your channel name, even though it doesn't have to be exactly the same. YouTube will suggest a handle based

on your channel name, but you'll want to modify it to your liking. If the Handle is available, you'll get a green circle with a check in the box, otherwise you'll have to get creative. Handles are becoming a big deal and a hot commodity, so many good ones are already gone.

With all three items entered, your dialog box should now look like Figure 3-4.

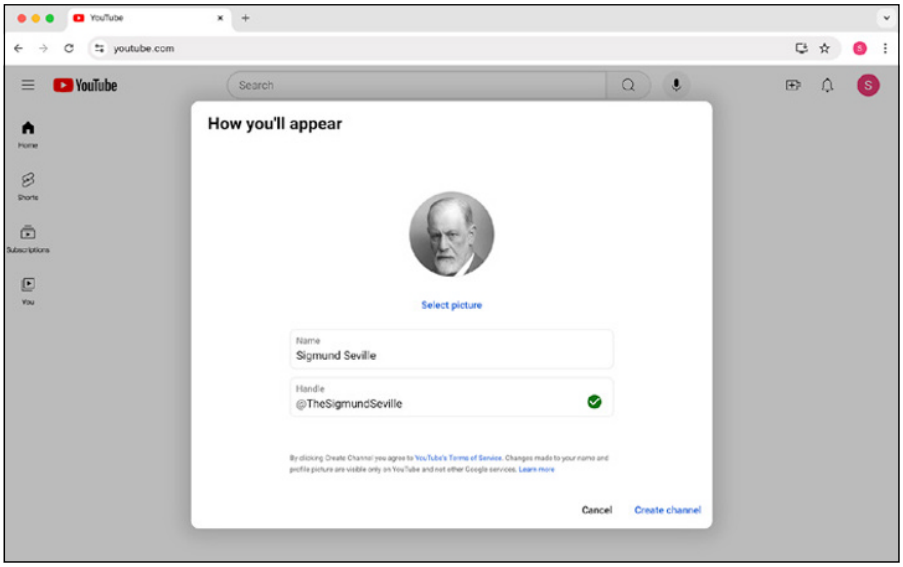

FIGURE 3-4: Viewing your new appearance.

TIP

Unlike earlier versions of YouTube, you can change your channel name and handle on a regular basis. Unless something significant has changed, we don't recommend doing that, especially as your brand becomes more well known.

4. **Click Create Channel.**

You should now see a page that looks like Figure 3-5. Great work! You've created your own YouTube Channel. That wasn't so bad, was it? Now we're going to do some minor customizations in preparation for creating and uploading videos later in this book. If you don't see your profile picture yet, you'll learn how to view it in the following steps.

TECHNICAL STUFF

Every YouTube channel has a URL, which does not change, even if you modify the channel name and handle. However, it's really not meaningful to humans. For the YouTube channel we just created, our actual URL is `www.youtube.com/channel/UCnn71D00UCS_AXjdkSP3EDA`.

That's pretty bad. YouTube now uses your handle to create a pretty and more memorable URL. In this case, we now have `www.youtube.com/@TheSigmundSeville`.

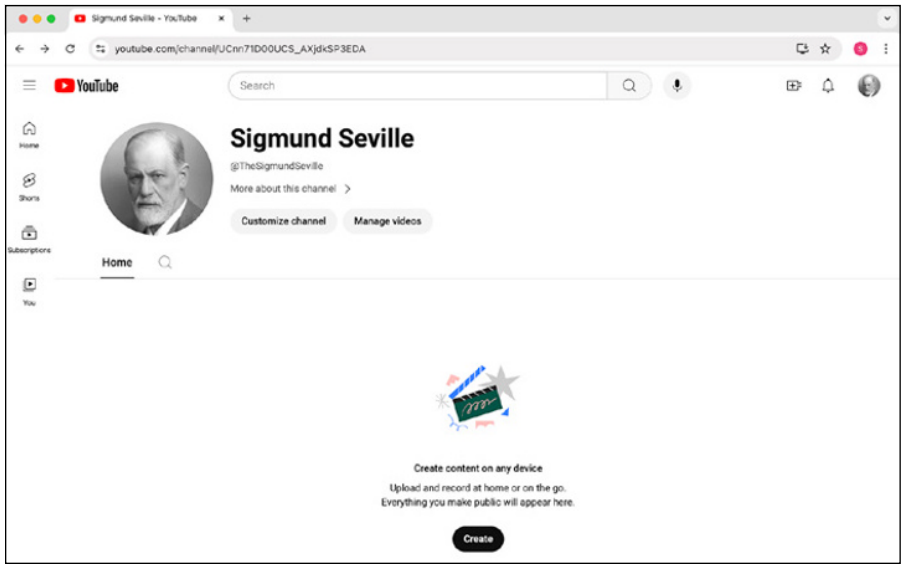

FIGURE 3-5: Seeing your newly-created YouTube channel.

5. Click Customize Channel.

Now you get to see all the intricacies of your newly-created YouTube Channel similar to Figure 3-6. There's a lot of stuff here, but you don't need to worry about too much of it, at least not yet.

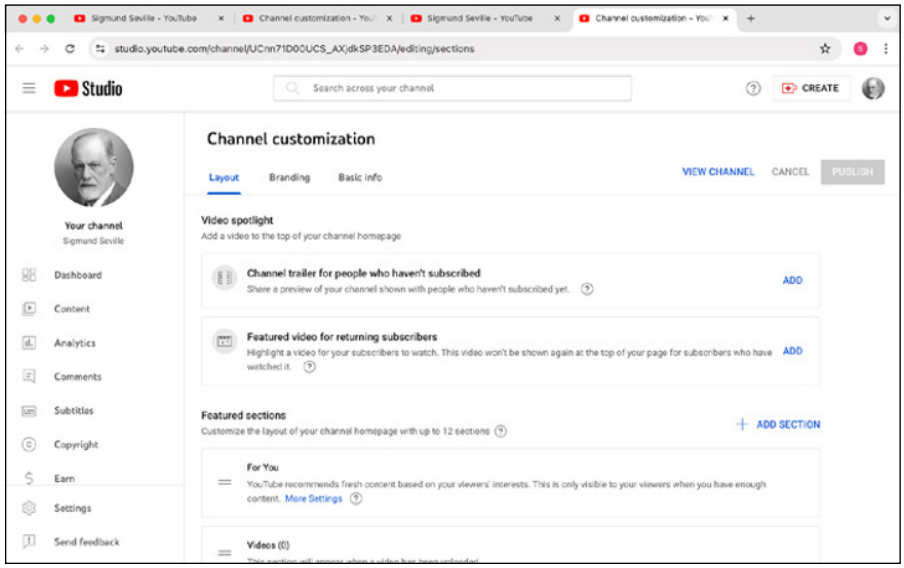

FIGURE 3-6: Customizing your channel.

6. **Under Channel Customization, click the Branding tab.**

You can change three elements used for channel and content branding, as shown in Figure 3-7:

- *Picture*: If you want to change or remove your profile picture, simply click Change to upload a new image or click Remove if you don't want one at all.
- *Banner Image:* This is the image that embellishes the top of your channel. But there's a caveat — large screen televisions, laptops, and mobile devices all have different screen sizes and resolutions.

  You're going to need a big image for the banner, at least 2048x1152 pixels and no more than a 6MB image file. Pick an image where what you want to convey is in the center so it show up on all screens, regardless of size. We cover more on this later in this chapter.

TIP

- *Video Watermark:* This is your branding for the video player and is a small 150x150 pixel image overlay. You can set this up later when you have video content. This image will show up on all your videos in the bottom right of the video player and allow viewers to easily subscribe to your channel right from the video.

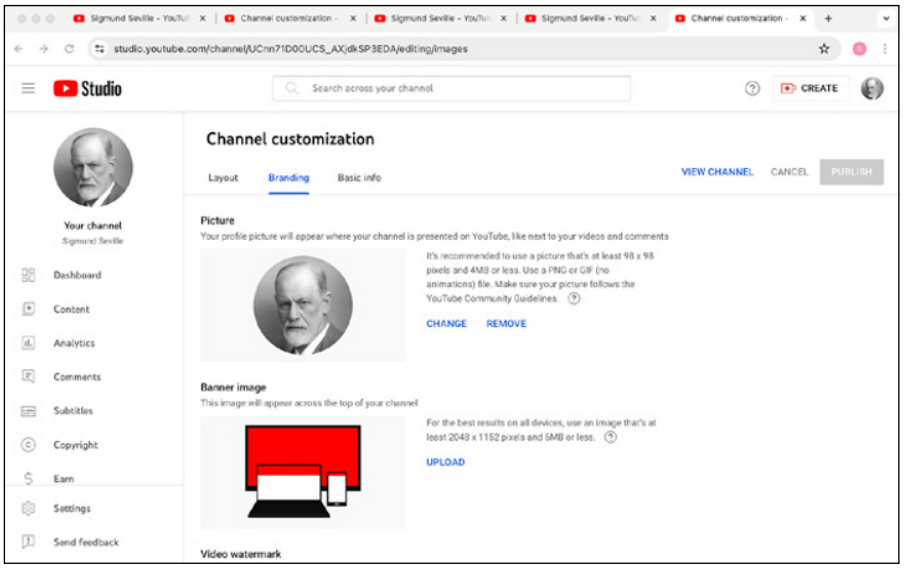

FIGURE 3-7: Updating your profile and channel branding.

7. **Click Publish to save all your branding changes.**

   Your banner will now show up on the Channel customization page (see Figure 3-8), You can view how it looks on your channel by opening a new tab in your browser to look and update as you see fit. We recommend keeping the Channel customization tab open until you're done with YouTube channel setup.

8. **Under Channel Customization, click the Basic Info tab.**

   At this point, whether you've decided to stick with your own name or come up with an original one, you have the option to set up some crucial details about your channel. Don't skip this task — it makes your channel more visible and accessible to others:

   - *Add a channel description:* This is the elevator pitch people see when searching your channel (see Figure 3-9). It's a good way of introducing who you are and what kind of content you make. It's also a way of making your channel more visible when searched online (also known as search engine optimization, or SEO). Don't skimp on this; the more descriptive words and phrases you use, the better off you are.
   - *Link your websites:* Whether it's a website or a social media page, link them here. This enables you to easily drive traffic to whatever page you're trying to promote (see Figure 3-9).
   - *Provide your contact information:* If you're creating relationships for your channel, this is very important.

     Create a new, different public email address for your channel that is separate from your email that you used to create your channel. Your email box will thank you.

TIP

9. **When you finish setting up the basic info for your channel, click the Publish button. (See Figure 3-9.)**

   You are now the proud owner of a channel with no content and a boring default layout. (Check out Figure 3-10 to see what we mean.)

10. **Click More About This Channel.**

    Up pops an overlay similar to Figure 3-11. Here you'll find your handle, description, links, and more. You can always update this information as you see fit.

    If you gave your channel a new name, by clicking your avatar in the top right, you'll notice that your name has changed from your Google account name to your brand-spanking-new channel name.

Now that you've established your channel, let's take a closer look at some additional features and settings.

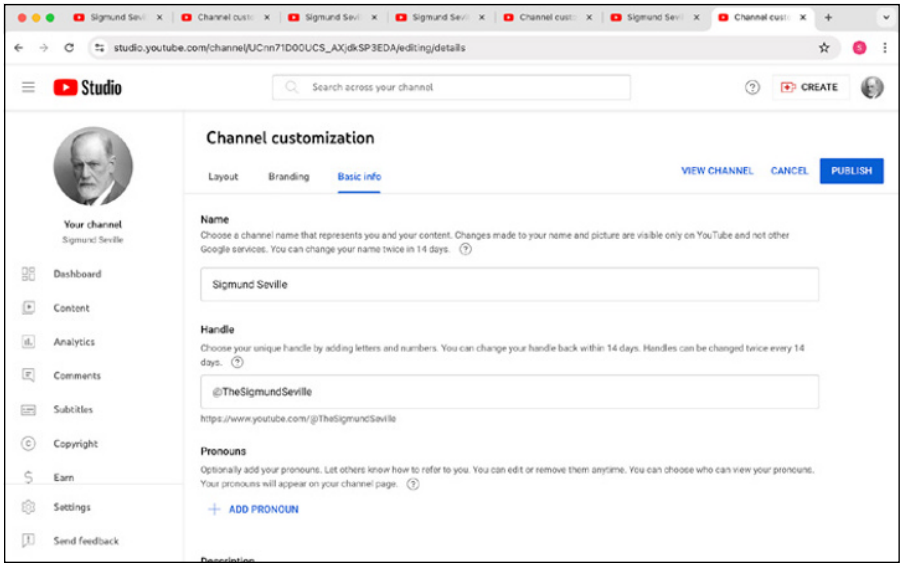

FIGURE 3-8: Customizing basic info.

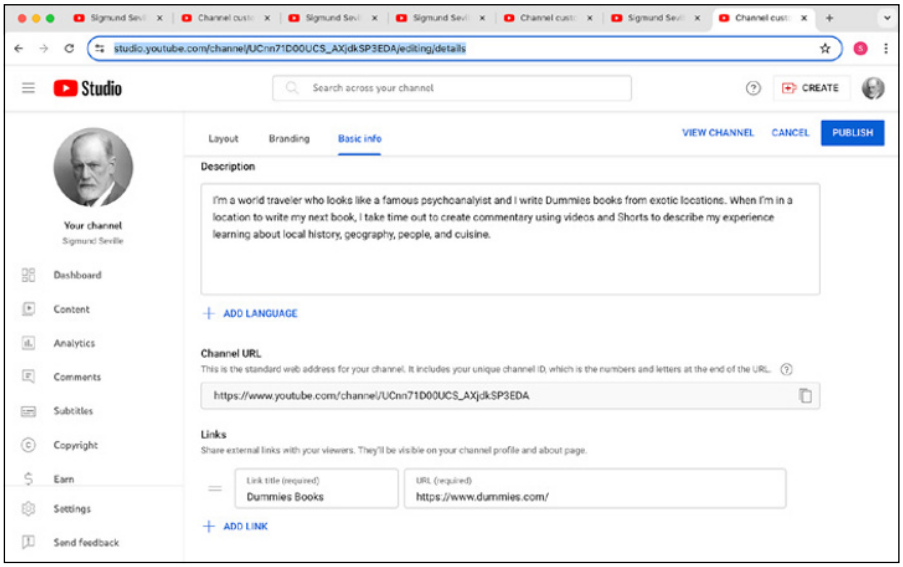

FIGURE 3-9: Where to update important basic info fields.

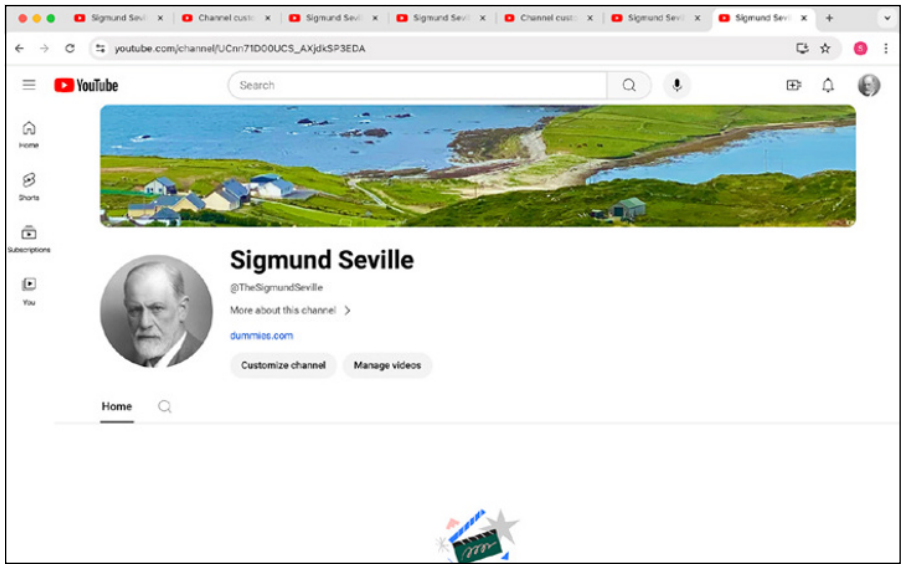

FIGURE 3-10: The default channel layout, which is boring.

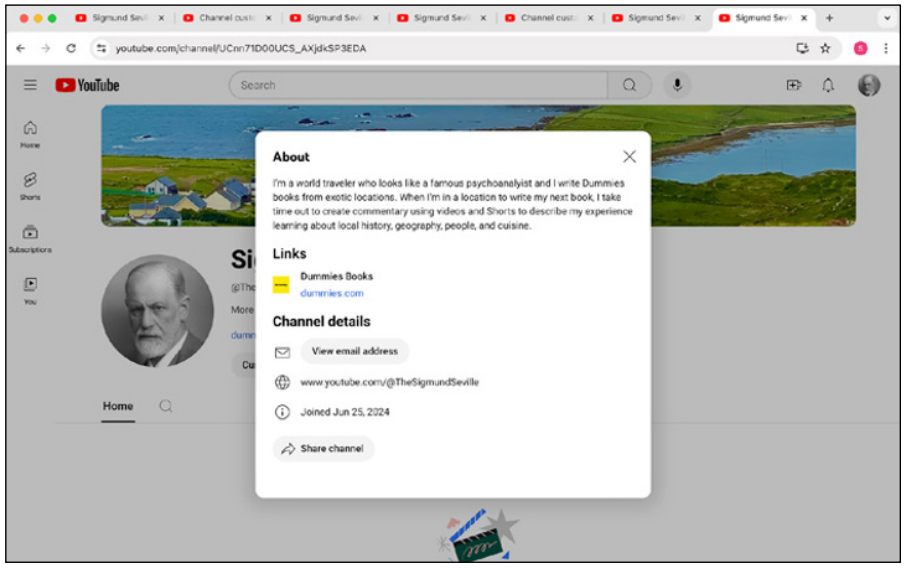

FIGURE 3-11: Looking at some YouTube channel details.

CHOOSING A CHANNEL NAME AND HANDLE

Take a reflective pause before you choose a channel name, handle, or another identifying criterion you want as your public face for the whole YouTube world. An overhasty decision here could end up being one you regret later. Many a creator has made the mistake of beginning to upload videos to what they thought would remain a low-key, personal channel, only to have that channel take off in popularity, at which point they begin to feel trapped in a channel named after their cat. (Okay, just to be clear, this wouldn't be a problem if the channel is actually about your cat).

Keep the following advice in mind when making your reflections:

- **Avoid rushing into anything.** You should think hard about this decision. Though it seems like a light one, it can truly impact the success of your channel in the long run if you choose a bad name.
- **Relate the name to your content, if possible.** Are you creating a channel about video games? Try to work a gaming term into your title. If you plan to create fitness-related content, try to integrate workout or sports terms.
- **Steer clear of profanity, vulgarity, and inside jokes.** Though you may find it hilarious to name your channel Dadfarts, a name like this one necessarily limits your market. It's hard to predict what path your videos might take on their way out into the world, and a sophomoric name (or a downright obscene one) might deter your viewers from sharing your video. ***Note:*** *You want people to share your videos!*
- **Come up with a catchy name.** Your channel name needs to be memorable. People love puns, rhyming, and alliteration, but don't try to integrate all three. That's a little much.
- **Make the name easy to spell.** People need to be able to find your channel, and choosing a word that's difficult to spell can prevent people from finding you. Do *not* see this as a felicitous opportunity to create a recondite channel name thronged with abstruse vocabulary that will confuse and confound your potential viewers.
- **Provide a name that's easy for people to talk about.** When you think you've hit on the perfect name, try reading it aloud a few times and make sure you can pronounce it. You want to have a channel name that people can talk about and make themselves understood. The best test for this is to call a friend on the phone and

direct them to your channel. If you can tell your friend the channel name and they can get there without your having to spell it, you have a usable name on your hands.

- **Ensure that the name is available and that you won't be confused with another business on YouTube or elsewhere.** You should search the web in general, and YouTube specifically, to make sure your brilliant channel name isn't already in use elsewhere. You should also ensure that the handle you prefer is available. So, even if your channel name is available, your handle may not be available. Check this in advance or else it can turn into a real problem.

Navigating Your Channel

A YouTube channel has two primary purposes. For most users, YouTube is for watching videos. When you log in to your YouTube account, you're met with a homepage offering a lot of videos for you to watch. You also see several ads — no surprise there — as well as suggestions from YouTube for what you should watch. You see sections for some of the channels you subscribe to, and some recommendations for content you might like. A lot of the logged-in experience is covered in Chapter 2, but now it's time to dig a little deeper and look at what you can do with your channel.

The Your Channel menu item

The value of making your channel stand out can't be overestimated. Though your videos are ultimately the most important tool you have for attracting viewers and subscribers, the look of your channel is a big deal, too. YouTube wants viewers to spend more time watching content. What better way to do this than by giving users, like you, the tools to make an awesome YouTube channel experience?

When you're logged in on YouTube, clicking the circular icon in the top right with the first initial of the name on your account — or your picture, if you added it while setting up your Google account — reveals a dropdown menu. Selecting the View Your Channel link near the top of the menu brings you straight to your public channel page. Figure 3-12 shows the basics of an established YouTube Channel, but as a creator, you can add more.

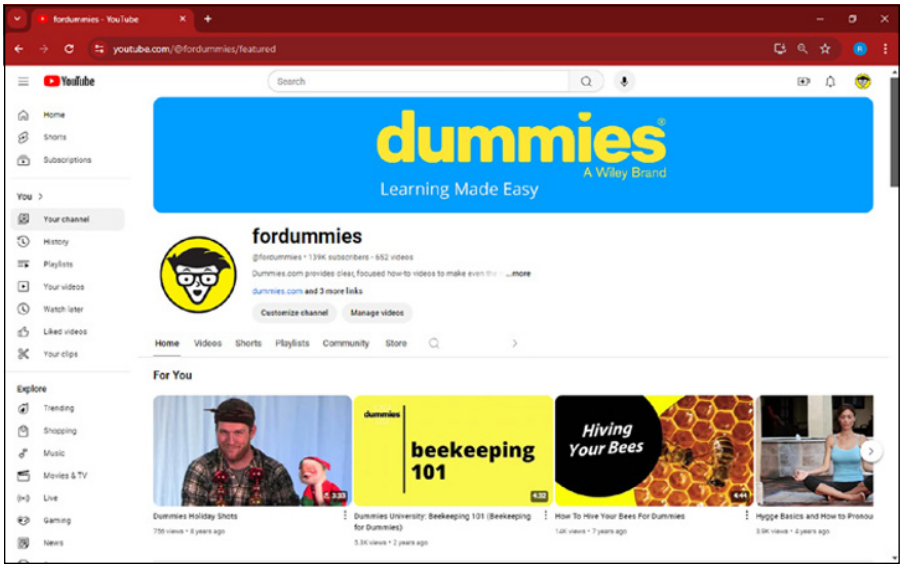

FIGURE 3-12: An established YouTube Channel's page.

Note the following elements:

- **About:** This section is accessible by clicking the . . . more link under your channel header. The About section acts as your opportunity to tell your viewers all about yourself and/or your business. It is important that you maximize your channel description (up to 1,000 characters) to improve your channel's discoverability. Here, you can talk about your brand, discuss the videos people should expect, and include an email address for viewers to contact you outside of YouTube. You can also include any relevant social network sites that you might be active on. Your viewers can come here to see some quick stats on your channel, such as your total view count, number of subscribers, and the date you created your YouTube channel.
  - *Customize channel:* Clicking the Customize channel button takes you directly to the Customization tab within YouTube Studio. Like we mentioned earlier, here you can make changes to your channel layout, branding, and update other important channel information.
  - *Manage videos:* Clicking the Manage Videos button leads you straight to the Content tab in YouTube Studio, which is the most useful place to manage the settings for your individual video uploads and Shorts, edit playlists, posts, and more. We cover a lot more about how to use the Content tab in Chapter 7.
- **Channel art:** Channel art is like a billboard ad for your channel. It's one of the first things users see when they visit your channel, and it should reinforce your brand. Adding channel art is something you'll want to do as soon as you can.

- **Channel icon:** On the left side of your channel name is the *Channel icon.* This element is an important one because it acts as your channel's identifying mark on YouTube and Google; it appears next to your channel's name all over both sites; it shows up in subscription lists; and it appears next to every comment you make. If your channel art is the face of your channel page, this icon is your face everywhere else on YouTube. A Channel icon is typically a brand logo or a picture of the channel's content creator.

Here's a list of even more elements you can display on your channel to make it unique:

- **Channel trailer:** You can add a channel trailer for unsubscribed viewers. (Think "trailer" as in movie trailer, not "trailer" as in trailer park.) This is a perfect opportunity to show your audience what your channel is all about, what content you cover, what days you publish, and anything else you think might help viewers subscribe to your channel and watch tons of your content.
- **Featured video for returning subscribers:** Just like the channel trailer for unsubscribed viewers, you can add a featured video for subscribed viewers to enjoy. This video disappears for subscribers after they have watched it once.
- **Sections:** These are groups of videos that help viewers explore your content. Create sections to make it easy for your viewers to browse and find content that interests them. Think of sections as bookshelves that hold content of similar types. There can be up to 12 sections containing your playlists, your most recent videos, your most popular videos, or other collections of content that you want your viewers to see. While the default sections are great to start your channel off, it's best practice to use as many customized sections as you can.

TIP

Create sections with multiple playlists in addition to just shelves with individual videos. This strategy helps your Playlists tab appear more organized, making it easier for viewers to find more content quickly. Be sure to have an eye-catching thumbnail image for every video in a section and every playlist.

The Channel tabs

Just like a web browser, YouTube channels have tabs. Tabs are helpful for viewers looking to navigate your channel quickly and efficiently. Each tab has a different functionality, intended to help the viewing experience:

- **Home:** Viewers see this tab by default when they click on your channel from a YouTube search or when they manually type your channel address in their web browser. Your channel trailer and sections all appear here, on the Home tab.

- **Videos:** The Videos tab contains exactly what you'd expect — all public videos on the channel. The default view is Latest — the videos that were added to the channel most recently. The viewer can always sort by Oldest or most Popular instead.
- **Shorts:** The Shorts tab contains all of the YouTube Shorts content uploaded on your channel. Just like the Video tab, the default view is the Latest Shorts uploads, but it can also be sorted by Oldest or most Popular.
- **Playlists:** The Playlists tab is where all your channel's public playlists can be found. As a creator, you can fill up playlists with your own content. You can also curate content from other YouTube channels for your playlists if you think they are relevant to your audience.

REMEMBER

Playlists also come up in YouTube search results, so always use descriptive thumbnails for your videos, as well as compelling playlist titles and descriptions. A playlist is a great way to extend your viewers' session time on your channel. (Session time directly supports your channel ranking and discoverability on YouTube search.)

Though we recommend making and sharing playlists, you may hide them from others by clicking "View Full Playlist" under the playlist you want to edit. You can then change the privacy setting of the playlist.

- **Community:** This feature provides an additional way for you to engage with your audience through public posts. Use this tab to post images, videos, and polls to drastically increase and enhance how you interact with your audience.
- **Store:** The Store tab is a part of YouTube's Merchandise Shelf feature, where users can sell featured merchandise on their videos and channels. This feature is not available for everyone. Users are eligible to apply for this feature if their channel is part of the YouTube Partnership Program, if the channel is not set as Made for Kids, and if the channel has never received a Hate Speech Community Guidelines strike.
- **Search:** The Search tab is the final tab available to users, and it is represented by a search glass and text input box. This feature works like the regular YouTube search function, but it is limited to the videos on the channel you are browsing.

Customizing and Branding Your Channel

If you're viewing your channel page, clicking the Customize Channel button beneath your About section opens the Customization tab within YouTube Studio, which is where you do the bulk of the customization of your channel. This section

outlines an important series of decisions you'll need to make to ensure your channel is a success, so pay attention to what you're doing! Lots of viewers judge the quality of a channel based on its look and feel. If there's one stereotype that pretty much holds true for YouTube viewers, it's that they're highly distractible. A professional-looking channel homepage that holds a viewer's interest indicates to potential viewers that you've put a lot of thought, time, and effort into creating your channel. So get to it!

Viewing the Channel customization sections

Within the Channel Customization tab in YouTube Studio, there are three tabs that allow for different types of customization. We talked a bit about these earlier in this chapter, but this section covers them in more detail. Here is a breakdown of the editable elements available within each tab:

- **Layout:** Use this tab to add a video spotlight, such as a channel trailer or featured video for returning subscribers, and to add or edit featured sections to showcase different collections of your videos. You can even rearrange the featured sections from this tab to change the arrangement of content on your channel.
- **Branding:** Use this tab to add branding elements to your channel, such as uploading a profile picture with your channel logo, uploading corresponding banner artwork, and adding a matching video watermark to appear on all your videos. Branding helps you stand out from other creators and can make your channel look highly professional.
- **Basic Info:** Use this tab to edit important text elements on your channel, such as your channel name, channel handle, personal pronouns, channel description, social links, and email address.

Creating channel art

As mentioned, having good channel art is critical to developing a successful YouTube channel. This section discusses best practices for creating and uploading channel art. As you are aware, YouTube is available on a lot of different devices. Your audience may be watching on a TV, computer, or mobile device. Given that fact, YouTube has gone to a lot of effort to create a system that allows your channel to look good across all kinds of delivery platforms. It has come up with some guidelines for artwork that you would be wise to follow. If you pay attention to the size of the graphics needed, you should have no trouble with your channel looking good, no matter how your audience is looking at it.

TIP

Channel art is most effective when it is representative of the channel's content. For example, if your channel is about the hottest new shoes, your channel art should include images of shoes.

REMEMBER

Before you get around to adding the channel art, you need to *create* it. This could likely be done with AI or with a little creativity and image editing software. We recommend software like Adobe Photoshop to create custom channel art, but it's an expensive option. If you're investing in the Adobe ecosystem for editing, Photoshop is probably a good option for you. If you're more interested in free tools, something like GIMP, an open-source photo editor (available for download at `www.gimp.org`) might be more up your alley.

YouTube has templates that make creating channel art that works across platforms much simpler. For each editable element, YouTube provides image sizing guidelines and the ability to crop your image once it's uploaded.

REMEMBER

When creating art destined for use in the YouTube channel art template, it's important to adhere to the advice it provides. You need to ensure that your text lands in the sections of the template that will not be covered up by your channel icon or channel links after you upload this image. If you edge too close to the top-left corner, you'll have a hard time maintaining the continuity of the image across devices and operating systems. Your text and logos might be cut off or unreadable on some devices, and that will contribute to viewers dismissing your channel and moving on to something else. Channel art is an opportunity to make a first impression, and the cold truth is that bad channel art can drive away viewers. Be sure to check how your channel art looks on several different devices.

TIP

If you find all this talk of pixels and formats confusing, it might be a good idea to consult with someone who has some graphic design experience. Even tracking down a graphic design student to help you tailor an image to the YouTube specifications can be helpful. If you do ask someone for help with your channel art, remember that creative professionals like to be paid for their work. Just because your friend is a graphic designer or your nephew is an art student doesn't mean that they want to work for you for free. Even if you don't pay them the market rate, paying them *something* is the decent thing to do.

Managing channel art

After you've created the art for your channel (or received art from the nice person you convinced to help you), it's time to add it. YouTube has made this a pretty straightforward process; here are the steps:

1. **From the Channel Customization page in YouTube Studio, navigate to the Branding tab.**

TIP

If you've already set your channel art and want to change it, roll your mouse pointer over your profile picture or the banner on your channel page, and a small box with a camera icon and the word Edit will appear. Click this icon to link directly to the Branding tab in YouTube Studio to upload your new artwork.

2. **From the Branding tab, click Upload or Change for your desired channel element:**

Depending on whether or not you have art work, you will see some variations in text around the options for uploading profile pictures, banner art, and watermarks. If you've never had channel art before, the option will simply read Upload. If you have previously uploaded art, you will see options to Change or Remove the existing artwork. See Figure 3-13.

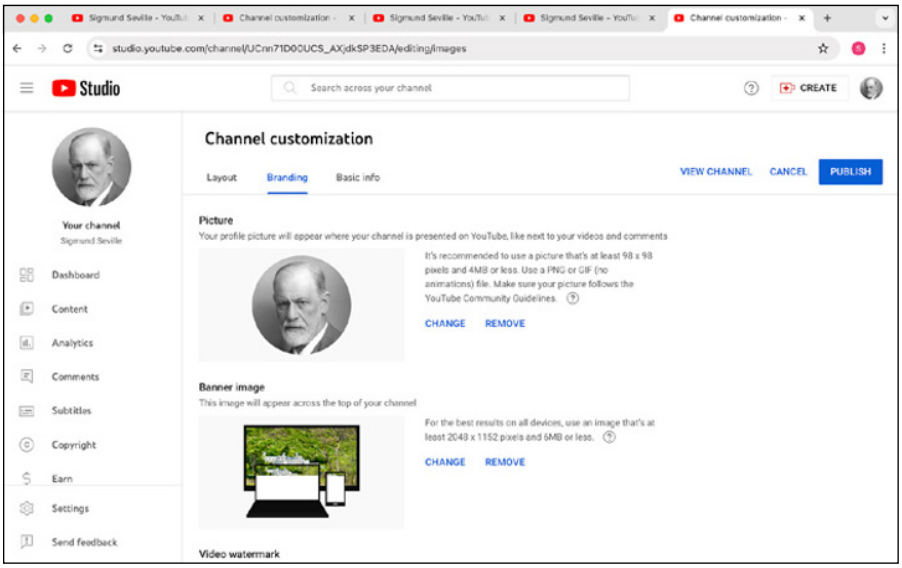

FIGURE 3-13: The updated branding page.

3. **(Optional) Crop your photo.**

For each channel element for which you upload artwork, you have the option to crop your image. For your profile picture and watermark, the image crop is the same for all devices. For banner artwork, you will see a more detailed template that shows how your banner will appear on different devices (see

Figure 3-14). If you decide that you want to crop your photo, move the blue cropping mask around to select the portion of the photo you want to use. For banner art, hovering over the device name shows you a better preview of how your image will appear on different devices.

4. **After the size and placement of the image are to your satisfaction, click Done, and your channel art is in place!**

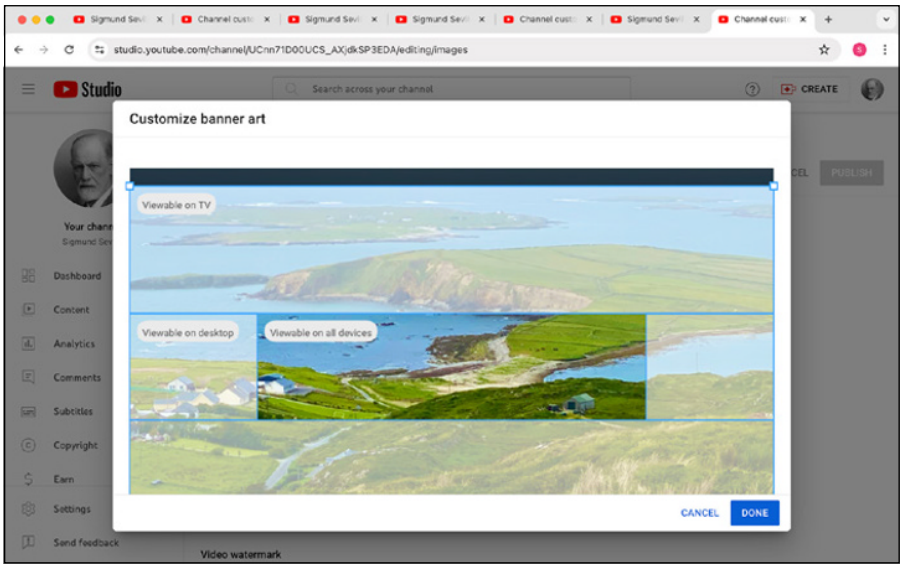

FIGURE 3-14: Orienting your custom banner.

Creating your profile picture

The profile picture is an important aspect of your overall channel art and branding strategy. Though your channel art is the most prominent face directly on your channel's page, the profile picture is the face of your channel everywhere else. It's also the icon associated with your Google account, which means that this picture appears pretty much any time your channel is listed on YouTube, and it appears next to all the comments you make on the site. So, creating a profile picture that works for you is important.

Creating a good profile picture can be tricky. You want something that is simple and easily recognizable — one that allows viewers to quickly recognize your content as *your* content, in other words. As usual, if you can't pull all that off, at least don't use an image that will drive away viewers. Don't use an offensive or obscene

image, and definitely avoid foul language. Not only will that stuff alienate potential subscribers, but it will also get you in trouble with the powers-that-be at YouTube. Keeping things simple is probably the best bet, and even a simple-colored background with the first letter or initials of your channel goes a long way toward adding a degree of professionalism. If you can add a little bit of themed art to that simple layout, all the better.

When creating an image that will work with your channel, follow a couple of basic guidelines:

- **Image size:** Your icon appears on the site at 98x98 pixels most of the time, but you should create your icon as an 800x800 pixel square and upload that size. Let the site scale the image down for you because it results in the best possible image quality for your icon.
- **File format:** YouTube recommends that you upload your files in PNG or GIF format (no animated GIFs are allowed). Both of these formats should be available in your image editor, so choose the one that works best for you.

Managing your links

The last part of the channel art setup involves adding your website links so your audience can follow your content outside of YouTube. You can add links to many social networks, merchandise providers, and even iTunes or Spotify if you have music to promote. The first link you add will be displayed prominently on your channel page near the Subscribe button. All other links will appear under your channel's About section. Adding links is, like many of the tasks in this chapter, accomplished in a few simple steps:

1. **From the Channel Customization page in YouTube Studio, navigate to the Basic Info tab.**
2. **Scroll down to the Links subheader and click the + Add Link button.**

   From here, give your link a title and add the corresponding URL. If you have several link, you can rearrange them here as well. You can add up to 14 links to show on your channel. See Figure 3-15 for a representation of this process.
3. **Be sure to click the Publish button in the top-right corner to save your links.**

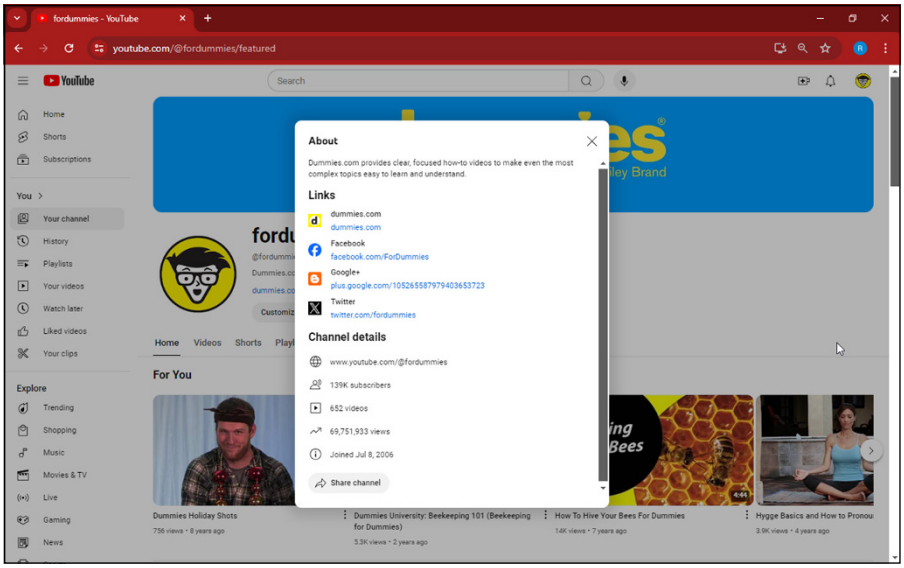

FIGURE 3-15: How links are displayed in the About section of a channel.

Managing Uploads

Arguably, the most important part of building your channel is adding video content. That is, after all, why YouTube was created. We talk more about the nuts-and-bolts of uploading a video in Chapter 7, but we want to close out this chapter by giving you the big picture.

WARNING

Before you upload anything to YouTube, it's a good idea to familiarize yourself with the kinds of things you *can't* upload to the site. YouTube disallows several types of content, and uploading content that violates these guidelines can get you in trouble. You can even lose your account. YouTube reserves the right to remove any video at any time, but these types of videos are explicitly banned and will get you in trouble with the YouTube authorities:

- **Pornography:** YouTube doesn't tolerate pornography or any sort of sexually explicit content. YouTube also points out that the company will report any videos of child exploitation to law enforcement if they are uploaded to the site.
- **Illegal behavior:** YouTube removes videos that show drug abuse, underage drinking or smoking, animal abuse, bomb-making, and a host of other illegal behaviors that people might (foolishly) want to document and share.

- **Gratuitous violence:** Videos that show people being attacked, hurt, or humiliated are also banned from the site.
- **Hate speech:** Videos that demean a group based on race, ethnic origin, disability, gender, age, or sexual orientation are removed if flagged by the community.
- **Threats or harassment:** YouTube is not a place for stalking, harassing, bullying, or predatory behavior. Content of this type will be removed.
- **Spam:** Videos with misleading titles, descriptions, thumbnails, or other metadata will be removed. *Misleading* means that the title doesn't match the content of the video. A good example of a misleading title is "Miley Cyrus at my house," when the video is actually about a cat riding a skateboard. It's also unacceptable to post spam comments on videos — for example, asking people to subscribe to your channel or to visit your website if it has nothing to do with the video you're commenting on. This typically leads to the comment being flagged as spam, and this makes it invisible to other viewers.
- **Misinformation:** Everyone makes mistakes, but deliberately uploading videos that make false claims is a serious offense that can harm others. You should never upload content with the intent of deceiving or misleading others about serious subjects. This is known as misinformation.
- **Copyrighted material:** You should only upload content that you own or have the appropriate licensing rights to use. Though the other community guidelines are important to the smooth functioning of the YouTube community, the copyright restriction is hugely important to YouTube as a business. (See Chapter 16 for more information on copyright.)
- **Private information:** Do not post anyone's personal information without their consent and explicit approval. Content featuring personal information will be removed at the request of the affected individual.
- **Impersonating others:** Copying another channel's layout/appearance or uploading content with the intent of making it look like someone else's are both against the rules and will result in the removal of videos and/or disciplinary action being taken against your account.
- **Exploitation of children/minors:** YouTube takes content involving minors very seriously. Bullying, harassing, sexualizing, exploiting, misleading, or making any other attempt to harm children is explicitly forbidden from YouTube and will be removed.

TIP

You can read more about YouTube's Community Guidelines for uploading content in greater detail at `www.youtube.com/howyoutubeworks/policies/community-guidelines`.

2 Making Great YouTube Videos

IN THIS PART . . .

Seeing how you can make your videos the best they can be

Planning your video shoot

Editing your masterpiece

Jumping through all the hoops to upload your video

IN THIS CHAPTER

- Understanding the basics of making a good video
- Choosing the right camera
- Planning your video
- Recording sound
- Dissecting the video

Chapter 4

What Makes a Video Good?

Not that long ago, video was a far cruder, much simpler medium. At home, people had more fingers than television channels, and for those making their own movies, consumer-level video came in two varieties: bad and worse. Maybe that's a bit unfair, but the quality lagged far behind commercial productions.

Clunky cameras that captured low-resolution video were no match for the broadcast-quality content found on television. And the quality of television was inferior to the look of a feature film. Not sure about that last one? Just watch a music video from the early days of MTV, circa 1982.

Since that time, technology has evolved to the point where you can now watch hundreds of thousands of channels and where most anyone who wants to has the ability to make a broadcast-quality movie that can be seen by potentially a global audience. "Shot on iPhone" and consumer-level videos not only come close to broadcast quality but can even rival it. That means your YouTube video can look truly professional. Of course, *can* is the operative word here.

Clearly, technological advancements have allowed online video to change the rules of consumer-level moviemaking. Yet, because of the relative adolescence of online video, there's some confusion about what makes a good video. Understandably, that criterion depends on the particular genre. For example, a music video has a different set of standards than an instructional video on techniques for giving your date a goodnight kiss. And that differs significantly from the standards you'd apply to a video showing your cat chasing a red dot. Though diverse in content, there are still some fundamentals that every video should adhere to.

But what fundamentals are we talking about here? What makes a good video, in other words? Given the nature of human taste, coming up with clear criteria for defining a good video may be a fool's errand, so it might be better to concentrate on avoiding those factors that make a video nearly unwatchable. As a video producer, that makes your job relatively easy. Just eliminate the negatives — such as shaky camera work, distorted audio, or bad exposure — while providing entertaining content.

It sounds easy, but you're right to suspect that it may be a little more complex, due in part to some false conceptions that folks still hold about online videos. Some people still believe that an online video, or one destined for YouTube in this case, doesn't require the same planning or quality as any other production destined for broadcast. That's simply no longer true. The way things have shaken out, more and more viewers are watching content online rather than on broadcast TV, and they are demanding better stories and better quality. This demand means that, with more people watching video on sharing sites like YouTube, the bar continues to rise when it comes to production value and content.

We will talk a bit more about fundamentals later in this chapter, but right now, we want to take a look at the *most fundamental* one out there — your choice for capturing video.

GENERATIVE AI

With the advent of generative AI video, many people have prophesized that *filmmaking is dead*. Let's cut through the noise and say it for what it is: AI is a tool in a toolbox. Programs like Sora AI promise a lot, but will likely be initially expensive and plagued by the same uncanny valley effects most image generators now struggle with. It's not advisable to use AI entirely for video generation, at least not for now.

Knowing What Makes a Good Video

An immediate side effect of watching a bad video is that you no longer want to finish watching it or never watch it again. But that still begs the question of what makes a YouTube video truly good. Sometimes, that answer is a little harder to figure out. The more obvious indicators of a good YouTube video are that it's captivating, informative, or, of course, makes people laugh. However, the three factors that make good videos great are surprisingly obvious:

- **Clear subject:** Being able to see the main focus of the video is step one. If you miss this, there is no game.
- **Good audio:** No audio is better than bad audio, but great audio enhances the visual story.
- **Strong story:** Whether it's five seconds or five hours, it should make some semblance of sense.

So, how do you make a good video? It's the result of getting the right gear, producing the right video size and speed, and choosing the right framerate. We discuss those issues next.

Choosing your gear

Trying to investigate and compare equipment online can be daunting. The terminology, the options, the opinions — how are you supposed to choose? Fret not, building an arsenal of the right gear does not have to be complicated or expensive. Odds are, you may already have some of what you need. First, you need to answer two basic questions:

- What size and shape video do I need?
- What framerate do I need?

Choosing the right video size and speed

Videos, much like people, come in all sorts of sizes, shapes, and speeds. Knowing the intended final output of your video will help determine the parameters of some tools you may need to make it (if you want to avoid major headaches down the line). YouTube supports resolutions as low as 240p (the *p* stands for progressive scan) to as high as 8K (the *K* stands for kilopixels in this case); though the sweet spot is usually 720p/1080p (also known as high definition) or higher. The

common video orientations are widescreen (also known as 16:9 or horizontal), vertical (widescreen flipped 90 degrees; also known as 9x16), and square (1:1 or 1080x1080 pixels).

TECHNICAL STUFF

The numbers in front of the letters indicate how many frames per second are shown. As for the *p,* it stands for *p*rogressive, where the video image is drawn progressively, line after line. In 30p, to take one example, one whole frame is typically shown every $\frac{1}{30}$ of a second. The *i* stands for *i*nterlaced, meaning the odd or even rows in the picture show every $\frac{1}{60}$ of a second; 60i is typically used for sports or fast-paced videos because it results in less of a flicker feel; 30p is often perceived as higher quality for less action-based footage because its resolution brings with it a clearer image; 24p is the framerate of film — but getting that "film look" also depends on lighting and composition.

TIP

Higher resolution video typically takes up much more space; however, it is most suited for adapting to other aspect ratios because there isn't significant degradation to video quality when rescaling footage. If you plan on manipulating the footage in post, higher resolution gives you more to work with.

Choosing the right framerate

YouTube can handle videos filmed at different framerates, but different framerates can only handle certain types of manipulation when edited. For instance, anything shot over 60fps (frames per second) or higher can be slowed down nicely for that beautiful slow-motion effect, but videos shot closer to 24fps will look choppy when given the same treatment. Explicitly knowing what you need can help you determine what gear you need. Most cameras address this criterion decently, but some excel in unique ways.

There are benefits and limitations that come with framerate. Shooting at a higher framerate gives you the artistic license to make shots slow-motion when editing, but this usually comes at the cost of taking up more memory. Additionally, slow-motion seems fun in theory, but can come across as gimmicky if overused. If slow-motion is fundamental, try limiting it to just one or two shots at a higher framerate, then filming everything else at 24fps.

Picking the Right Camera for Your Needs

Once upon a time, a video camera was that bulky device you bought to capture moving images on video tape. Over the years, the cameras got smaller and tape formats evolved from analog to DV and from HD to 4K, with corresponding

increases in the ease-of-use and quality categories. Not only that, but the prices dropped precipitously, which means you can now buy a decent camera at an affordable price.

The only difference now is that there's a wider — some might even say "bewilderingly wide" — selection of cameras. The following list describes the major categories:

- **Smartphones:** Just a few short years ago, considering a cellphone as a means of capturing a serious video would earn you an eyeroll because the results were often dismal. Not any more, as serious works have been captured on phones, including the Oscar-winning documentary *Waiting for Sugarman.* They keep getting better and better. Some phones are now capable of shooting 4K and capturing extremely slow-motion videos. Accessories are becoming more prolific as well, including mountable lenses and stabilizers. And, to top it all off, almost everyone has a smartphone. Why not put it to good use and save a few bucks?
- **DSLRs:** The digital single-lens reflex camera (digital SLR or DSLR, for short) is a jack-of-all-trades, as seen in Figure 4-1. This camera rightly dominates the still-photography market, but is also extremely capable of providing excellent high-resolution video (as high as 4K on some makes and models.) That's a great thing because the image sensor (when compared to conventional camcorders and other digital cameras) is significantly larger and, therefore captures better quality. The camera can take advantage of all lenses that fit its mount, so you can capture movies using a wide range of lenses, from extreme telephoto to ultrawide-angle to anything in between. Many accessories are available to further enhance your camera's shooting capabilities, from mounting rigs to external microphones to LED lighting. On the downside, the camera controls and handheld ergonomics favor still photography over moviemaking, and the accessories can be expensive.
- **Point-and-shoots:** Though nowhere near as capable or as powerful as a DSLR, point-and-shoot cameras (or compact cameras) are still impressively capable devices and are extremely popular among many YouTubers. Lighter, simpler to use, and comparatively cheaper, these cameras are a great option for any first-time videographer. You do sacrifice some capabilities compared to a DSLR; you don't have the ability to swap out lenses, because most use an adjustable, fixed lens. Few are capable of capturing video as high-resolution as DSLRs are capable of, though some newer models are making it possible. These cameras also lack many of the fine-tuned internal controls that most DSLRs allow you to augment. That being said, whether you're a professional vlogger or just starting to dip your toes into things, point-and-shoot cameras are extremely impressive and useful.

FIGURE 4-1: This DSLR camera is a versatile jack-of-all-trades.

Kara/Adobe Stock Photos

- **Action cameras:** You may not have heard of the term, but you have heard of its biggest player: GoPro. These mini marvels are rugged, waterproof, relatively inexpensive, and mountable on just about anything to capture amazing quality from a unique perspective — from skydiver views to the rider's view on a bike, as shown in Figure 4-2. Boasting features aplenty, these cameras are capable of capturing up to 4K (the standard for ultra-high-definition television), stabilizing extremely shaky videos, and, on some models, even shooting 360-degree video. On the downside, many action cameras are limited to shooting wide-angle views.
- **Webcams:** A webcam is inexpensive to purchase, on the off chance that you don't already have one built into your computer. That makes it perfect for situations where you sit down in front of the computer. Just plop yourself down, check the lighting, and start talking. Because most capture in HD (some are even capable of shooting 4K), you're good to go. The downside is that you need to stay put or else you might position yourself out of the frame. The audio can sound "thin" if you're not using an external microphone. And worse than that, if the lighting is too harsh, you can look *bad.*
- **Dedicated camcorders:** Camcorders are designed for shooting videos: They're comfortable to use and have dedicated features and controls specific to moviemaking. But most other camera options, DSLR or other, are capable of many of the same features and more. Another dilemma is its monomaniacal devotion to a single task — making movies. That means some users may pass on a camcorder simply because they can't use it to send a text or make a call.

nickshot/Adobe Stock Photos

FIGURE 4-2: Mounted directly on the bike with a handlebar mount, the GoPro provides a point of view perspective.

» **Screen capturing devices:** Maybe you're not trying to film a video IRL, but that doesn't mean you don't also need a camera! Whether you're a gamer trying to capture your latest speedrun or a Photoshop artist making a timelapse of some vector art, screen capture software provides the ideal cameras for your needs. There are plenty of options out there: OBS Studio is a free program that allows you to record and livestream, while Camtasia is a paid program that comes with its proprietary editing software.

REMEMBER

Purchasing a top-quality model and instantly expecting to make great movies isn't much different from thinking you can purchase a Gibson Les Paul and become a great guitarist without knowing how to strum a single chord.

Both guitar-playing and videography depend on understanding technique. Gone are the days of haphazardly handholding the camera while randomly shooting a movie on the fly. It will not only lack cohesion but can also make the audience feel like they're having a seizure. As much as we like talking, thinking, and writing about cool cameras, we want to stress the fact that technique is crucial. That's why we focus much more on technique in this chapter than on fancy hardware.

Making a Gameplan

Just a camera and microphone do not make a shoot; for things to run smoothly, you need to plan in advance. If you're capturing sounds, are there lines? Do you have a script? Are you filming any important actions or moments? Are you filming inside or outside? How is the weather? Do you need lights? It's easy for questions to arise if you don't have a clear understanding of your video and its goals.

Scripting and outlining

Maps are to trips as scripts are to stories. No one expects you to be the next Dalton Trumbo, but if your video requires talking, it helps you (and your on-camera talent) to have it mapped out. While there are excellent dedicated programs like Final Draft, these often come at a price. Luckily your preferred word-processing program should be more than sufficient.

REMEMBER

Just keep this important detail in mind — one double-spaced page of a script equates to about one minute of video. This means the longer your script, the longer the video, the more you need to capture, and so on. If a fully flushed-out script feels like too much work, even a basic bulleted list of talking points is better than nothing. And for the over-achievers who want to plan each individual shot, there are plenty of storyboard templates on Google Images. Simply grab one and sketch out as much or as little of the scene as you want!

Creating a schedule

Depending on the size of your video and the number of people involved, having a timed-out schedule will ensure the shoot is successful from top to tail. When creating a schedule, it's good to consider these elements at least:

- Setup
- Filming
- Meal breaks
- Breakdown

If you have other people in your video, it's courteous to include an in and out time for them, too. Sometimes you may need to plan your shoot around a particular time of day, such as sunrise or at night, which affects when and how long you're able to record. Most Hollywood productions are scheduled down to the shot and minute; you don't need this level of detail, but any amount of time management will relieve a lot of stress.

Having backups

It wouldn't be a true shoot if something didn't go wrong. On the set of *Jaws*, the shark didn't work. In *Lord of the Rings: The Two Towers*, Viggo Mortensen broke a toe. A production of *Top Gear* accidentally destroyed a one-of-a-kind Mazda Furai prototype car. The point is sometimes life just happens. You can't avoid it, but you can cushion the blow.

When scheduling, plan some extra time in case setup takes longer than expected or an actor laughs during one too many takes. Have a backup day in case you're rained out. And above all else, have extras of anything expendable: batteries, memory cards, hard drives, pens, labels, waters . . . you get the point. You don't need to go to doomsday levels of prep, but having multiples of the essentials will save you time and trips to the store.

Building a shoot sack

Once you have all your plans outlined and equipment out and ready, it's time to bring it all together. Make sure to print multiple copies of your script and schedule, that way you can quickly address questions on the fly. Charge all batteries and fully erase (known as formatting) any memory cards. Check all cameras for functionality and clean the lenses. It's also helpful to bring along headphones, scratch paper and pens, a first aid kit, and any other essentials you may need. Finally, make sure you get a good night's sleep; shoot days are never dull.

Capturing Sound

The single biggest thing you can do to improve the audio in your videos is to obtain a decent external microphone, like the one shown in Figure 4-3. Though some camcorders do have a decent built-in microphone, you'll almost always obtain better results by using an external microphone. You can use a few different types of microphones:

- **Lavalier mic:** The lavalier microphone — or *lav mic,* for short — is also known as a *lapel mic.* A lav mic's primary advantage is that it is small. The microphone can be attached to the speaker's clothing, and it's small enough to be unobtrusive. Most viewers are accustomed to seeing newscasters and other video subjects with visible microphones, so it isn't generally off-putting for the audience. Lav mics are usually omnidirectional, which means they pick up sound from every direction. You hear your subject, but you also hear every sound in your recording environment.

TIP

Lavs work best in quiet environments or controlled studios. The nice thing about the lav mic is that it is, for the most part, a set-it-and-forget-it solution. After the lav mic is attached correctly to the talent and the levels are set, you only need to check periodically to ensure the levels are maintained.

FIGURE 4-3: An external microphone will drastically improve your video's sound quality.

LIGHTFIELD STUDIOS/Adobe Stock Photos

- **Shotgun mic:** A shotgun microphone (or *boom mic*) is a highly directional mic that is often used to record voices in videos. The shotgun mic is designed to record audio from a single direction, and it's less sensitive to sound coming from behind the mic, to the sides, or elsewhere around the subject. This type of mic is especially useful for isolating sources in noisy situations, where background noise can overwhelm the subject's voice. Shotgun mics, which are a lot larger than lav mics, need to be pointed at the talent from just off camera, no more than a foot from the speaker's mouth. This is usually accomplished by a boom operator, a human who holds the shotgun mic attached to the end of a pole and points it at the talent, or a c-stand with a clamp.
- **Handheld mic:** You often see onscreen talent using a handheld microphone. A handheld mic can be a practical solution for capturing audio, but it is clear that the talent is using a microphone. This is completely acceptable in newsgathering situations, and it can be a great solution for videos of that type.

WIRED OR WIRELESS?

Most microphones for video can be purchased in either a wired or wireless version. The wired version is connected directly to the camera with a microphone cable, and the wireless version uses some kind of radio signal to send audio to the camera or audio recording device without wires. The wireless option can be very useful, and it certainly feels futuristic, though it can be finnicky. As with any device that relies on radio transmission, interference can be a problem, especially in crowded urban areas. Wireless devices also use batteries, and dead batteries can be just one more thing to go wrong. Wireless mics are necessary for applications where the subject moves around a lot, or is far from the camera, but in other situations, it may be wise to consider wired mics. They may not have the same level of tech appeal, but they can remove a couple of layers of complexity from your shoot.

» **Smartphone mic:** If all else fails, the voice recorder on your phone will do in a pinch. Is it the best quality? No, but with a little zhuzhing in post, it will work just fine!

Considering Viral Videos versus Evergreen Content

One phenomenon created by the Internet is the spread of viral video. Just like a virus (except that it's the good kind that won't make you sick), a *viral* video spreads rapidly online and can garner millions of views in a relatively short time.

On the opposite side of the spectrum lies the *evergreen* video: As its name implies, a video with this distinction usually remains fresh and vibrant for longer periods, providing a timeless quality to the content.

Your channel's objective depends on being able to bring as many viewers as possible to your content. Sometimes that comes from a single, albeit extremely popular video, whereas at other times, it's more about having a healthy lineup of relevant content that doesn't become outdated quickly.

Creating a single viral video can bring a great deal of attention to your channel, and those visits can quickly monetize into big bucks, especially with a video that garners a couple of million views. On the other hand, evergreen videos (see the

later section "Evergreen content") lend themselves to less dynamic, though more steady buildup through a variety of content that keeps people coming back.

REMEMBER

Don't bet your YouTube strategy on trying to create a viral video. When it comes to viral videos, there's a random element to their success that cannot always be duplicated the next time around. Nevertheless, you can do some things to make success just a tad less random — we tell you more on that topic in the later sidebar "What makes a video go viral?"

Viral content

Viral videos usually consist of some trendy or contemporary aspect that allows them to build a huge audience quite quickly. For example, a new dance craze or music video sometimes makes for the most watched video, but it can also consist of a dramatic news event or a wild stunt that people can't stop talking about. Sometimes it fades away as quickly as it started, whereas at other times, it sticks around.

Evergreen content

Like a tree or shrubbery that never turns brown, the evergreen video remains popular with its niche audience for a long time. That's because it consists of content that people will search for often and over an extended period. If YouTube videos were gallons of milk, comparing the two, a viral video would have a shorter expiration date to more evergreen content. Though there's less pressure to creating a successful evergreen video, it still requires a lot of work to gain a following. You have to let people know that it's out there while keeping it relevant for them to venture out and find you.

The types of content that may have (potential) evergreen value include

- Instructional videos
- Educational videos
- Travel videos
- Overviews of holiday traditions
- Biographies of famous people

REMEMBER

Most evergreen content — instructional videos or content associated with a historical event, for example — doesn't usually go viral but can enjoy a longer run of popularity because the content continues to attract a steady stream of viewers.

WHAT MAKES A VIDEO GO VIRAL?

Viral videos usually have a humorous or quirky feel to them, and though most of the time they unintentionally gather a mass following, some corporations have managed to produce successful viral videos quite intentionally. But there's no guarantee that your video will find success, even if it's a promotional video with big money behind it.

Like the countless grains of sand, millions of videos are uploaded to YouTube — but only a few become viral sensations. As with winning the lottery, the success of a viral video is more "hoped for" than "planned for." Still, you can improve your chances by considering some attributes that other viral videos have displayed.

Consider these suggestions:

- **Engage the viewer.** You have to grab their attention before they know what hit them.
- **Be relevant.** Trends and pop culture references have a wide appeal to audiences, so why not integrate them into your video?
- **Add humor.** Make 'em laugh, and they'll keep coming.
- **Make it brief.** After grabbing viewers' attention and holding their interest, don't take a chance on losing them by droning on too long or having a lull in the action.
- **Use popular subjects.** The biggest YouTube video of 2023 was *TQG*, a music video by KAROL G and Shakira. It was, viewed over 1.1 billion times. Consider music as one popular subject.

After completing and uploading your video, here are some aspects that will help it along its viral path:

- **Spread the news over social media.** Post your video link on X or Facebook and ask friends to share it.
- **Send out emails.** Send out an email blast with the YouTube link.
- **Blog about it.** If you have a blog, blog about your video. Also reach out to other bloggers and ask them to do the same.
- **Listen to feedback.** It's no secret that comments found on YouTube can be hurtful, but some are actually helpful. Try to sift through them to find what people like about your video.

IN THIS CHAPTER

- Getting your settings right
- Keeping your camera on the straight and narrow
- Seeing your way with light
- Learning best practices for shoots

Chapter 5

Production: How to Have a Successful Shoot

Let's face it: Making video is easier now than it has ever been, which means that after following a few best practices, almost anyone can make a standout YouTube video with equipment they may already own. This chapter looks at a few of those best practices and helps guide you through some of the finer details.

Getting Your Settings Right

In Chapter 4, we briefly covered choosing the right size and speed for your video; this chapter expounds on that and then dives into a few other variables worth manipulating. Sure, you can just pop open your phone's camera and record a video in under two seconds, but that's what amateurs do! Plus, the automatic settings on phones and cameras, while pretty good in a pinch, can make some surprising adjustments that can and will make editing and viewing a headache.

The steps for adjusting settings vary from device to device. Make sure to consult your camera's user manual for detailed steps about how to properly set it up. The settings you need to consider are as follows:

- **Framerate:** It is important to set your framerate before hitting the Record button. By default, many cameras automatically adjust the framerate while recording, usually to help compensate for lighting changes. Though this doesn't look bad or offensive to the naked eye, it will make editing an absolute nightmare. Most cameras tie their framerate to the image resolution, so you'll be able to change both at the same time.
- **Resolution and format:** The YouTube player supports 4K video, and you really should have an HD camera to take advantage of that support. Most modern cameras are capable of shooting 720p SD (standard definition, 1280x720), full 1080p HD (high definition, 1920x1080 resolution), and higher (many are capable of 4K).

  The higher the resolution, the harder the camera will work and the larger the resulting file will be. While 720p produces a small file, the video will look grainy on most screens; lower-resolution images cannot be upscaled adequately for higher-resolution frames. However, higher-resolution videos scale down extremely well, meaning that if you capture a 4K video but only intend to broadcast in HD, you can punch in for more shot variety, but we cover that more in Chapter 6.

  REMEMBER

  The numbers in front of the letters indicate how many fields per second are shown. The *p* stands for *p*rogressive, where the video image is drawn progressively, line after line. In 30p, to take one example, one whole frame is typically shown every $\frac{1}{30}$ of a second. The *i* stands for *i*nterlaced, meaning the odd or even rows in the picture show every $\frac{1}{60}$ of a second; 60i is typically used for sports or fast-paced videos because it results in less of a flicker feel; 30p is often perceived as higher quality for less action-based footage because its resolution brings with it a clearer image; 24p is the framerate of film — but getting that "film look" also depends on lighting and composition.
- **Codecs:** Most cameras compress the captured video to save space on whatever recording media you're using. The compression software the camera uses is a *codec.* In the past, different codecs could result in wildly variable performance when the time came to edit. Often, footage would need to be transcoded to a different format in order for the editing suite to understand it. Thanks to improvements in editing software and hardware, transcoding is largely a thing of the past. All the major editing packages these days can handle just about any codec you care to throw at them. Just be sure to record in the highest-quality codec for your device — which generally means the least-compressed video. See Chapter 6 for lots more about video formats and codecs.

- **Shutter speed:** Not all cameras allow you to control shutter speed, but if you can, it's worth doing. Shutter speed is how quickly a single frame of video is exposed to light. The quicker the shutter, the less light it lets in, and vice versa. If your shutter is too slow, the resulting video can appear blurry; if it's too fast, movement may appear choppy. A good rule of thumb is that the shutter speed should be one over twice the framerate. So a video shot at 24fps would necessitate a shutter speed of 1/48 of a second.
- **White balance:** Different light sources emit different colors of light. The sun is bluer (5600K) while incandescent lights are warmer (2700K). When the white balance settings on the camera don't match the conditions, your video will look very odd. If you're lucky, you'll have total control of the light sources, but depending on your location, this can be difficult. The best thing you can do is set your camera's white balance to match the approximate conditions. This will make color-correcting in the editing stage much easier. By default, some cameras automatically adjust the white balance as lighting conditions change, meaning your subject will also change color. If you can, turn this off, as a consistent look is much more refined and professional.

TIP

Not all colors have the same hues and tints. If you want to guarantee color consistency across all your clips, consider investing in a color card or color checker (see Figure 5-1). This a small card with a series of colorful panels that have been produced to an exact degree of accuracy.

FIGURE 5-1: A color checker can help you match your colors across shots.

Yalcin Sonat/Shutterstock

- **Monitoring:** You need to be able to see your video as you shoot it. Most modern cameras have an LCD screen for monitoring video. Usually, manufacturers talk about these screens in terms of pixels. When choosing a camera, make sure you can tell whether the image is in focus from the view on the LCD. Built-in focus assist options also help when using a smaller LCD. If you cannot tell whether an image is in focus, you may need an external HD monitor, or you may want to add an electronic viewfinder (EVF) from a third party for monitoring.
- **Zoom:** To zoom is to change the focal length of the lens to make it seem as though the camera is closer to its subject. Though zoom is a somewhat familiar concept, one important fact to remember about it is the difference between optical and digital zoom:
  - *Optical zoom* is the actual telephoto effect produced by the physical change in the focal length of the lens, and it's the only zoom you would ever want to use. It allows you to zoom in on the subject with no significant degradation of picture quality.
  - *Digital zoom* is usually a very high, seemingly impressive number, but it's a feature to avoid. Digital zoom doesn't actually change the optics of the camera; it simply scales the image up, which produces a lot of static in the picture. Stated simply, it does nothing but make your footage look bad.
- **Image stabilization:** Higher-quality cameras and lenses often offer image stabilization, a feature that does just what it says — it stabilizes images. One hallmark of video from people who are new to videography is shaky footage. Image stabilization can help with this problem, and it comes in a couple of different flavors:
  - *Optical image stabilization:* This type of correction features gyroscopes and moving elements inside the lens itself. When the camera shakes, the lens detects the movement, and the lens elements roll with the punches, so to speak. The lens parts move to correct for the motion, and the sensor captures a stable image.

    TIP

    Internal gyroscopes can be noisy, so be sure to use an off-camera audio recording device when using optical image stabilization. (An internal camera mic is sure to pick up the noisy gyroscope sounds.)
  - *Digital image stabilization:* This correction uses various software algorithms to reduce the impact of shaky hands on your video. Unfortunately, some of the tricks it comes up with aren't that aesthetically pleasing. For example, the most common way digital image stabilization corrects an issue is by removing the edges of the frame. More often than not, you end up with a degraded image that's just not worth keeping. Yes, you may be able to correct it in post-production, but your best bet is to collect the highest-quality image while recording in the field.

- **Autofocus:** Like most things in life, this feature can be great when used properly or an obstacle when left to run amok. Intelligent autofocus that can target a face or object is excellent for shots with lots of gradual movement. However, many autofocuses struggle with rapid movements and low lighting. Also, if your scene is flat or your subject is too small or far away, the autofocus will constantly readjust as it searches the frame. Locking the focus to a fixed point ensures that your image will remain consistent and sharp.
- **Sound:** While the internal mics on most cameras and phones aren't great, it's still important to make sure they are recording. Your final video will — hopefully — use audio from a dedicated external audio recorder, but the audio attached to your footage (called *scratch audio*) is vital for allowing you to synchronize your video to your audio. Check out Chapter 4 for more on sound.

TIP

Those wooden clappers in vintage movies aren't just for show; they still play a critical role in movies and videos to this day. Commonly referred to as *slates* (see Figure 5-2), the distinct, sudden snapping noise they produce is used to align video to audio in an editing timeline. In lieu of purchasing a slate, you can just clap after you start recording on all your devices.

REMEMBER

The best way to get clean audio is to keep the set quiet. Sometimes this is easier said than done, but do your best to limit outside noise by finding a remote or insulated location to film.

FIGURE 5-2: Slates help you align your video and audio when editing.

Winter Summer Media/Shutterstock

Stabilizing the Shot

One of the most important things you can do to give your video an air of professionalism is to stabilize your shot. Nothing says amateur video like extremely shaky handheld video. We've all watched home videos that induce motion sickness as the camera whips around. Many tools can help you lock down your shot:

- **Tripods:** The most useful stabilizing tool is the simple tripod (see Figure 5-3). It has three legs; you attach your camera to the top, and your shot is as stable as stable can be. Tripods are readily available online, at camera stores, and at electronics stores, and they have a wide variety of price points. We recommend investing at least $50 here. It can be helpful to get one that has a built-in level to keep your shots from being crooked.

FIGURE 5-3: Tripods are simple ways to stabilize your shots.

MaeManee/Shutterstock

TIP

When you're shopping for a tripod, choose a model that has a fluid panning head, meaning you can turn it smoothly from side-to-side (known as *panning*) and that it's built to resist bumps and vibrations. At some point, you'll want to add a few camera moves to your repertoire, and you'll need that fluid head when that time comes. A basic still photography tripod may be cheaper, but you'll regret it when you need to move the camera during a shot. Tripods with nonfluid heads cannot replicate the smooth motion that a fluid head can provide.

- **Monopods:** These are one-legged cousins of the aforementioned stabilizer (see Figure 5-4). No, this doesn't give you a perfectly stable shot, but it's a great tool for reducing a majority of unwanted shake and movement. It's also much more portable and compact, because you're working with only one leg versus three!

FIGURE 5-4: Monopods are typically less steady but more convenient than tripods.

New Africa/Shutterstock

- **Dollies:** A dolly is simply a set of wheels for the camera (see Figure 5-5). The simplest dollies attach to the bottom of the tripod, and — voila! — your camera is now on the move, allowing you to create interesting motion and following shots.
- **Stabilizers:** A number of handheld stabilizer rigs are available these days for phones and cameras, like the DJI Osmo (see Figure 5-6). They require a great deal of skill to use effectively. That means practice. If you want to get good handheld shots using a stabilizer rig, you have to practice, practice, practice to get the hang of using the thing. If you do put in the time and get good at it, you can create some cool shots with these devices.
- **Sliders/cranes/jibs:** A wide variety of devices are also on the market to create moving shots. Sliders (see Figure 5-7) allow the camera to move on rails, providing a sense of smooth motion in the shot. Cranes/jibs allow the camera to move from side to side *and* up and down in space, creating a smooth sensation of flight (see Figure 5-8). Many of these are available as add-ons to tripods. Although they aren't absolutely necessary, a few nice moving shots do provide a feeling of high production value to almost any project. Sliders start at around $200; if you're ready to build something in order to save money, search YouTube for some DIY slider videos.

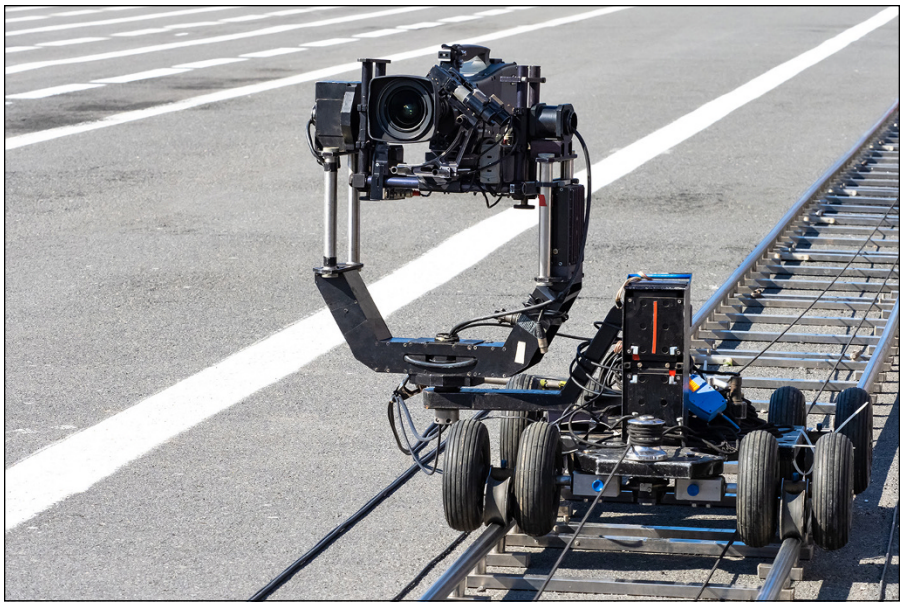

FIGURE 5-5: Dollies use wheels to allow you to slide your camera with ease.

FOTOGRIN/Shutterstock

FIGURE 5-6: Handheld stabilizer rigs can take a lot of practice to master.

Everyonephoto Studio/Shutterstock

FIGURE 5-7: Sliders move cameras back and forth on rails.

H_Ko/Shutterstock

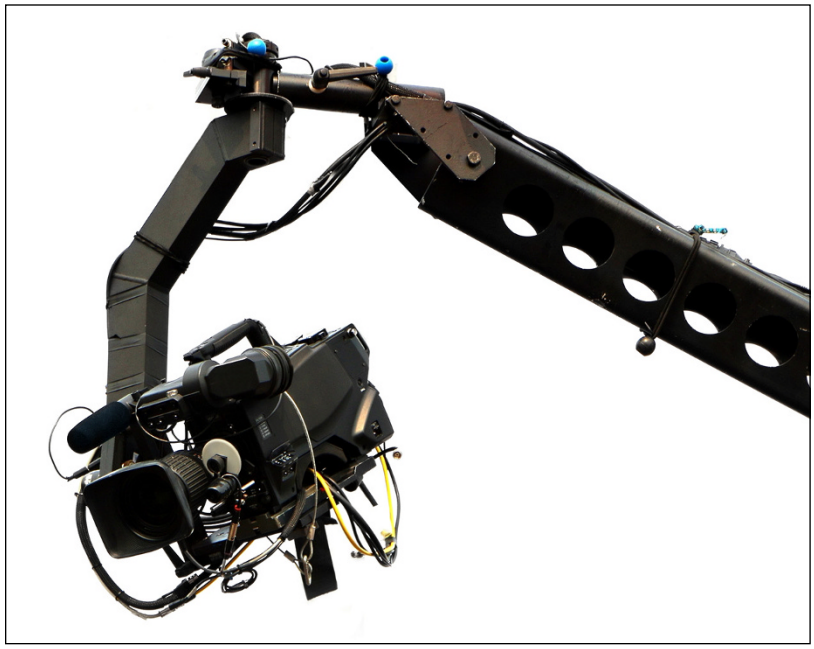

FIGURE 5-8: Cranes/jibs allow cameras to move in all four directional planes.

zieusin/Shutterstock

Seeing Your Way with Light

Another important aspect of creating a video with some level of professionalism is lighting. You don't need to win any lighting awards, but decent lighting goes a long way toward making a watchable video. You can approach lighting in a couple of ways: You can buy specialized lights, which will probably produce the best results, or work with the lights you already have. Just using lamps from around the house isn't ideal, but it can get you started, and there are ways to improve your video's look just by putting some thought into light placement.

Setting up three-point lighting

The simplest, and generally most useful, lighting setup for shooting a person inside is *three-point lighting.* As its name implies, this lighting setup involves three lights, and it illuminates a subject in what is considered a traditionally pleasing way.

The following list explains the lights that are involved (see Figure 5-9):

- **Key light:** The key light is the main (and brightest) light in a three-point lighting setup. It's usually placed to the right or left of the camera, and it points directly at the subject from a 30- to 60-degree angle. The height of the light should be set, ideally, so that it points slightly downward on the subject's face, but not so high that it creates shadows on the face. It should point down from slightly above the subject's eye level.
- **Fill light:** The fill light is a generally a softer light that should be pointed at the subject from the opposite side of the camera. The fill light shouldn't be as bright as the key light. It's there mainly to create a more even light on the subject. Using only a key light would usually result in creating dramatic shadows on the subject's face, and unless you're shooting a horror movie or a serious drama, you probably should stick with somewhat even lighting.
- **Back light:** The back light (sometimes called a *hair light*) shines from behind the subject and casts a thin outline of light around the subject's head, almost like a halo. This is not intended to give the subject an angelic look — but rather to create depth and separate the subject from the background. The back light can be directly behind the subject, but it can also be placed at an angle to the subject. Be sure not to get the light in the shot if you're going to place it directly behind the person.

» **Background light:** We know, it's confusing to add a fourth light to a section about three-point lighting, but the reality is that most three-point lighting setups also use a background light. This light does what its name implies — it lights the background. This is sometimes used to call attention to the background, but it's most often used to light the background separately from the subject. This can help create a sense of distance between the subject and the background, and it can help enhance the separation between the two.

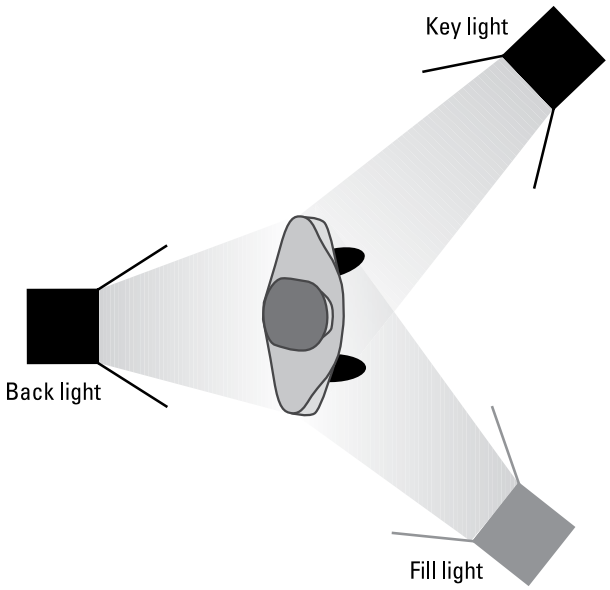

FIGURE 5-9: Three-point lighting helps illuminate your subjects so they stand out from their surroundings.

Setting up high-key lighting

Another viable, if less popular lighting scheme is high-key lighting. This involves using multiple high-powered key lights and turning them all on very brightly. This setup basically floods the subject with light. Though this setup lacks subtlety, we recommend it because it's simple. It also allows for quick production, because pretty much all shots require the same lighting setup. No one will comment on your beautiful lighting if you use this setup, but it does make things easy.

WORKING WITH THE LIGHTS YOU HAVE

Your video will look best if you have actual video lights. The problem with this strategy is that video lights are expensive. Why can't you just use the lights you have in your home? The good news: You can. You can create a simple three-point lighting system using lamps from around your house. If you use them, though, you should follow a few guidelines:

- **Move the lamps.** Using home lights is the easy way out, but it's usually not quite as easy as just turning on the lights and rolling the camera. You need to move the lights around into something resembling the three-point setup. You also might have to move some lamps from other rooms because house lamps don't have the same brightness as video lights.
- **Standardize.** When possible, try to use the same type of bulb in all the lamps you're using to light the scene. Mixing fluorescent and incandescent lights can cause weird-looking results in your picture, so you should choose one or the other and make sure your bulbs are all the same color temperature (the color of light is measured in temperature). Each different type of light bulb emits a different temperature; mixing bulbs can make skin tones look unnatural, for example. LED lights are also a good option because you can adjust the color temperature of some.
- **Lose the shades.** Lampshades can cause uneven lighting, so you should take those things off while you're using your lamps as video lights. This also helps maximize the limited power of household lighting.

Best Practices for a Successful Shoot

Your camera is set up, the actors are in place, and all eyes are on you. You're ready for the first take of the day. What do you say and when do you say it? You can set up a smooth, productive workflow by using a series of commands to move through each shot within a scene.

Speaking a common language

Draw from this handy list of words and phrases to communicate with your cast and crew — and to help them communicate with you:

» "**Quiet on the set.**" When you let everyone know that you're about to "roll camera," the only audible sound should come from whatever is happening in

front of the camera. Side conversations, coughing, and mobile phones can all spoil a take, and you should have zero tolerance for them.

- **"Roll camera."** When your actors and crew are set, cue the cameraperson to start shooting.
- **"Camera rolling."** The camera person should reply to "Roll camera" with this phrase after shooting begins. If you're doing the shooting, just say "Camera rolling."
- **"Sound rolling."** Someone who is listening to the sound separately on headphones says this phrase to indicate that the audio sounds good.
- **"Slate."** First, call out the scene; this can be a letter and number or just a general description of what's happening. Then, with the slate visible in camera, slam the swinging arm or just clap your hands. This allows you to synchronize your audio and video across multiple cameras and devices, when it comes time to edit.
- **"Action."** Finally! This famous cue tells actors to start the scene and lets everyone else know to remain quiet. Wait a few seconds after the camera and sound are rolling to say it.
- **"Hold."** If a sudden event (such as a passing police siren) interrupts a shot, call "Hold" to let everyone know to stop what they're doing until the interruption ends. Then call "Action" again.
- "**Cut.**" After a scene ends, wait a few seconds to say this famous cue so that the crew continues shooting video and recording sound until the moment you say it.

After a few tries, your cast and crew will have the order and rhythm of these cues down pat, and your set will quickly sound professional (as long as an actor doesn't announce, "I'll be in my trailer").

TECHNICAL STUFF

Every take of a shot should have *handles* on it — a waiting period of a few seconds before you say "Action" and after you say "Cut." This way, an editor (who may be you) who works on the scene in post-production has a clearly defined segment of video to work with. "Action" and "Cut" are also cues for them.

WARNING

Don't wait to press the Record button immediately after calling "Action" or "Cut" (a mistake typically made by novice filmmakers). This bad habit leaves the editor with a scene that is potentially missing its first and last seconds — a huge amount of editing time. (Applying a cool transition effect during the editing process — a dissolve or a fade-in, for example — is then impossible.) Also, actors shouldn't break character until you say "Cut." As they finish their lines, they should remain in place until you stop shooting. A good rhythm to get into when filming is this: press Record then say "Action," say "Cut" then stop recording.

Maintaining continuity

Continuity is the purely technical requirement of maintaining a consistent look and action in every shot, including the background and lighting of the set and the actors' costumes, hair, and (most frequently) movement. A mobile phone that's held in a character's right hand in one shot and shifts to the left hand in the next shot jars the audience out of the moment.

But don't stress; if continuity mistakes happen to you, you're in good company. Many successful Hollywood movies are full of continuity mistakes. Throughout *The Wizard of Oz,* for example, the length of Judy Garland's hair and dress changes several times. If that type of huge production can slip up, your video can, too.

REMEMBER

A simple way to keep an eye on actors' positions between shots is to call "Hold!" and quickly set up for the next shot. You can also show actors an earlier take so that they can position themselves to match their own movements. If your characters are drinking from a glass, for example, make the liquid level consistent from shot to shot (to prevent the audience from wondering how the glass was seemingly refilled). If you're shooting over several days, take a photo of your actors in full costume so that they can match their looks for the next day.

TIP

Continuity has an additional meaning for actors. It refers to their characters' mental and emotional states from scene to scene. When you're shooting scenes out of order, matching these states from the previous scene can be challenging. As a director, it's your job to keep actors on track from scene to scene by reminding them of their previous circumstances, such as where they're coming from, what has just taken place, and where they're headed. You can even draw a timeline for reference. Actors should see the big-picture view of their entire performances *and* their scene-to-scene progress.

Shooting a Great-Looking Video

To say that camerawork is a technical process, not a creative one, is a mistake. Film and video are visual media, and the camera resembles a paintbrush. A huge dose of creativity determines where to place the camera. If you look at the camerawork in the films of Alfred Hitchcock, Steven Spielberg, or Sofia Coppola, for example, you see one stunning, memorable image after another. This section explains how to use your camera effectively, from choosing angles and specifying movement to framing scenes and capturing extraordinary imagery.

To illustrate the techniques described in this section, we use the following familiar scenario to show how to use the camera and the *frame* (the rectangular image you see on a movie, TV, or computer screen) to better tell a story: When a young child plays ball in the house and his mother warns him to move outside, he ignores her request and instead breaks an expensive vase. Oops! The child's unhappy mother confronts him.

Composing and dividing the screen

Composition is the process of creating a picture that helps effectively tell a story within the camera frame for each shot. Just as a photo needs composition to possess more visual power, a moving picture needs composition to help tell the story more powerfully.

The rule of thirds (a visual arts composition guideline) divides a rectangular picture, such as a camera frame, into nine smaller rectangles of equal size — three across and three down. The lines and intersections where these rectangles meet are visual points of interest. Though this concept originated in photography and painting, it has its place in film and video production.

Using the rule of thirds to position the subject one-third of the way from the edge of the frame (rather than in the center of the frame) makes the picture stronger and more interesting visually, as shown in Figure 5-10.

tom/Adobe Stock Photos

FIGURE 5-10: Note how the image of this bird obeys the rule of thirds.

TIP

Because the rule of thirds also applies to framing the background of an image, you can create beautiful, symmetrical images in outdoor shoots by positioning the ground across the lower third of the frame and positioning buildings and trees and the sky in the upper two-thirds of the frame.

The rule of thirds is an artistic concept related to the way the human brain interprets imagery. It simply makes images "look better."

In the example, you can create tension in the shot (again, because of the way the brain processes images) by moving the camera so that the child is one-third of the way from the edge of the frame. When the child tosses the ball, you see the nearby empty living room, full of breakable objects, and you start to anticipate the ball flying from his hands and into Aunt Bertha's expensive Ming vase.

TIP

If you have a photo camera, try this experiment for capturing a better, stronger image. Frame the subject in the center of the shot, and take a picture. Then move the camera to frame the subject approximately one-third of the way from the edge of the shot. Then compare the photos.

Determining the best shot

Your selection of camera angles, or *shots*, is limited, technically, only by your imagination, though you should master the basic principles before trying any fancy tricks. This section explains the building-block shots you see in most film and TV productions, and most scenes are built using a combination of these shots. In Hollywood, *coverage* is the practice of shooting a scene from various angles.

When you start shooting video, take these types of shots first:

- **Master:** The master shot is the foundation of your coverage. It shows everything — every important element of your scene. Place the camera far enough away to capture all the action and shoot the entire scene from beginning to end. You can always cut back to the master shot to remind the audience where the characters are located in relation to each other.
- **Medium:** The medium shot moves in to show characters (or a single character) in an area from roughly just above their waists to a little over their heads. The medium shot is commonly used because it shows facial detail but still conveys a sense of the bigger picture.
- **Close-up:** In the close-up shot, the camera moves in tightly on a subject's face or on an object, such as the bouncing ball in this section's running example. The close-up is a powerful tool to show lots of facial detail and to build tension and emotion in a scene.

» **Extreme close-up:** In this type of shot, the camera moves in even more tightly on a subject to show lots of detail. A shot of a character's eyes or of fingers drumming on a table or of a doorknob turning slowly shows an intimate level of detail to drive home a particular moment. Though an extreme close-up is rarely followed by a master shot (it's too much of a leap for viewers to make from small to large), you can follow it with a close-up or a medium shot.

These steps describe one way to break down the scene in the bouncing-ball example:

1. **The master shot shows a child tossing a ball in the living room.**

   The shot is framed to show the child positioned one-third of the way from the edge of the frame. You can hear his mother say, "Don't play ball in the house!"

2. **Cut to a medium shot of the child watching the ball move up and down. He smirks and says, "No problem, Mom."**
3. **In the master shot, the child throws the ball high into the air. Uh-oh.**
4. **A close-up shot of the child shows him watching the ball begin to descend.**
5. **Cut to a close-up of the child's hand reaching for the ball — and missing it.**
6. **An extreme close-up shot shows his eyes widening as you hear a vase shatter.**
7. **Cut back to a medium shot of the child looking at the floor, horrified.**
8. **A close-up shot of the broken vase shows the ball lying in the middle of the glass shards.**
9. **Cut to a close-up of the child as he gulps, and his mother scolds him.**
10. **Return to the master shot, as the child turns to face his mother and blurts, "It wasn't my fault!" while she crosses her arms angrily.**

These steps break down a scene, moment by moment, into shots that underscore the emotion of every beat of the scene. We won't win an award for this scene, but we can probably make an audience feel tension (and make them laugh at the child's excuse). That's how you "paint" a scene with your camera and the camera frame.

WARNING

In any scene you shoot, keep your shots smooth and steady. In the age of point-and-shoot cameras, people have a tendency to start the camera rolling and then point it at various characters in a scene, in one long take. They often attempt this all-over-the-map approach with a shaky hand so that the scene ends up looking

like an earthquake just occurred. Unless you're shooting *The Great Quake of the 21st Century*, we recommend that you simply place the camera on a tripod. If your scene involves a lot of camera movement, shoot it with a smooth, steady hand.

Moving and grooving the camera

Anyone can put a camera on a tripod, turn it on, and shoot the scene before them in a single shot. But this style amounts to simply recording a scene, which is boring, rather than true *directing*, which uses the different shot choices that are available to tell a story, controls what an audience is seeing from moment to moment, and moves the camera to achieve great-looking images.

You can choose from a few basic camera moves to spice up your storytelling:

- **Panning:** Simply move the camera from side to side, along the horizon. If the child in the bouncing-ball example enters a room, spots the ball on a table, and walks to it, you can follow his movement by panning from the doorway to the table.
- **Tilting:** Move the camera laterally, along a vertical plane. In the example, you would tilt the camera from the child's hand grabbing the ball and then lifting it to his chest as he looks at it mischievously.
- **Tracking:** In this tricky-but-fun shot, you simply follow the subject throughout the scene. You can track the child from an outdoor starting point, keep him at a distance, and then follow him right up to the ball. The tracking shot, which is used in lots of Hollywood films, can be an effective way to show off. (A famous three-minute tracking shot from Martin Scorsese's *Goodfellas* follows Ray Liotta's character through the hallways and kitchen of a nightclub.)

TIP

You can pan and tilt by either using a handheld camera or placing it on a tripod or monopod. Tracking shots are typically accomplished with the use of a *gimbal* — a gyroscopically stabilized support — or dolly. To add a slick touch to your video, work out a brief tracking shot of one character.

Matching your eyelines

TECHNICAL STUFF

An *eyeline* is the invisible line leading from the eyes of a character on-camera to a person or an object that the character is looking at off-camera. When you cut to the next shot showing the off-camera person or object, it must be placed within the frame where the brain would expect it to be. If a character is looking upward,

for example, you should then cut to the object that the viewer sees, placed above the camera. If the character's eyeline and the object's position don't match (if they look down at an object that you then see hanging over their heads, for example), the audience becomes disoriented and disconnects from the scene. The eyeline makes a subtle but crucial difference when cutting between two people who are speaking to each other within a scene.

This section explains how to add two medium shots to the bouncing-ball example. One shows the mother furrowing her brow at her child, and the other shows the child lowering his head after being scolded. For these two shots, you can shoot the actors in this scene separately or even on different days because they don't appear in the frame together in this particular moment. Above all else, you have to match the eyelines of the mother and her child.

Suppose that the child looks up at his mother towering over him and then you cut to a shot of her face. Rather than look down at him, as your brain expects, she instead looks directly across the shot at an object at the height of her eyes. Your brain would automatically connect the two shots to make you wonder what she's looking at (another person in the room, for example). Because she's the taller of the two, her eyes should aim downward at him, at a spot that's as close to the same spot in the frame where his eyes were looking up in the previous shot.

A character who looks off-screen at another character should be looking at the spot where the other character would stand. If you *reverse* the shot (to show the other character), the second character's eyes should be focused on the spot where the first character is positioned. Any well-made TV show or film has examples of shooting proper eyelines. In one with incorrect eyelines, you cannot determine where characters are oriented in a scene.

TIP

To ensure matching eyelines, position an off-screen actor behind the camera so that the on-screen actor can look at that person and deliver their lines. Encourage actors to stand immediately off-camera, even when they aren't part of a shot, to help make eyelines match. It also helps a cast member with their performance to speak directly to their scene partner, even if the partner is standing off-camera.

Following the 180-degree rule

The 180-degree rule is a critical guideline for how scenes are shot in a film or video. When you watch a movie in which two characters are speaking and the cut moves from one to the other, you're likely seeing the *180-degree rule* in action: It establishes the spatial relationship between characters or objects within a

scene — specifically, when the scene cuts between shots of them. Most viewers are unaware of the 180-degree rule when it's followed; but when it isn't, viewers can become disoriented or confused about where characters are standing or sitting in relation to each other.

TECHNICAL STUFF

To use the 180-degree rule to construct a scene, imagine a straight line running down the middle of the characters, as shown in Figure 5-11. To avoid disorienting the audience, choose *one side* of the 180-degree line on which to shoot all your shots, and don't cross the line. Understanding this concept can be confusing, so we walk you through an example.

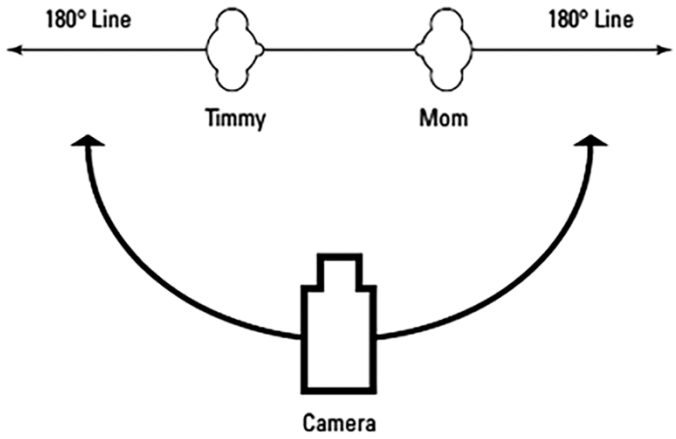

FIGURE 5-11: The imaginary line of the 180-degree rule helps you compose a scene.

Rather than show each actor individually, such as in the bouncing-ball example, you can use the popular Hollywood technique known as the *over-the shoulder* shot. For a shot of the child in the example looking up at his mother, you place the camera over her left shoulder and aim it at the child so that part of her left shoulder and hair frame the shot of his face.

Cut back to the mother looking crossly at her child. If you place the camera over his *right* shoulder, pointing up at the mother, who is towering over him, his right shoulder and hair frame the shot of his mother looking cross. Then you cut back to the first shot over her *left* shoulder, of the child looking remorseful.

In this example, you stay on one side of the line, over the mother's left shoulder and over the child's right shoulder. If we had moved from her left to his left, we

would have crossed the line and confused the audience, because they wouldn't know where the characters were standing in relation to each other.

In another example, you see a shot of a train flying down the tracks, moving from right to left in the frame. Cut to a person waiting for the train, and then cut back to the same train, except that now you've crossed the tracks and you're shooting from an angle on the other side. The train is now moving from left to right! Your brain believes that it's another train, heading directly for the first train, and suddenly you've made a disaster film!

REMEMBER

The 180-degree rule has one exception: If the camera is moving, you're allowed to cross the imaginary line if the shot itself moves across it. Then the audience will understand why you switch sides in the next shot.

Capturing the perfect take — several times

Whether you're shooting a scripted scene or an interview, you probably won't get the perfect take the first time every time. Someone may flub a line or slam a door off-screen, a dog may begin barking, or a sudden rainstorm may interrupt a romantic picnic scene. Or, the "magic" just isn't happening right away, and your actors need a few takes to warm up and discover the best way to play the scene. In any case, if you have to do it again, shrug your shoulders, yell "Cut," and prepare everyone for another take.

Shooting multiple takes can be demanding because actors have to repeatedly speak the same lines and hit the same marks. However many takes you shoot of a scene, the acting always has to seem fresh. One way to achieve this goal is to let the actors vary their line readings slightly on every take. You can always revert to an earlier take if you don't like the revised version.

TIP

After you capture an excellent take, shoot a *safety* take immediately afterward. This extra version ensures that your editor has two good takes to work with, just in case something goes wrong with the footage during the post-production process.

Shooting Specific Scenes and Takes

This section covers a hodge-podge of scenes you'll likely need to shoot as you cultivate video for your channel over time. From interviews to B-roll scenes to general good habits, we've got you covered.

Shooting an interview

Shooting an interview is a fairly easy task. In the world of marketing videos, you'll likely shoot a lot of sit-down interviews.

Follow these steps to shoot a simple but professional-looking interview:

1. **Set up two chairs.**

   One is for the subject and one is for the interviewer (who may be you). The subject should be seated.

2. **Set up your camera on a tripod.**

   Place the tripod to the side of your/the interviewer's chair, facing your subject.

3. **Frame and light the subject.**

   Use a medium shot, moving upward from mid-torso or slightly closer.

4. **Mic your subject.**

   For more on this topic, see Chapter 4.

5. **Have your subject look at you/the interviewer, not at the camera.**

   Looking into a camera lens tends to make a person self-conscious. You can conduct an excellent interview that has a conversational flow by having the subject speak to the interviewer. The camera serves to record the conversation you're having. (The most common camera style on YouTube is to have the subject speak directly into the camera; we recommend this style only if the subject can appear natural.)

TIP

A person who is verbose the first time they answer an interview question may want to answer a question a second time, after having the opportunity to find the best wording for their answer. To avoid being heard asking the interview questions, you can edit yourself out and have the subject rephrase your question within the answer, as in this example:

You:

> "How long have you been the president of Smith Industries?"

The subject:

> "I have been president of Smith Industries for 40 years."

Encourage your subject to answer as simply as possible, always including the crux of the question within the answer, and you'll have a professional-looking, easy-to-edit interview that you can replicate with different subjects.

Shooting extra footage and B-roll

B-roll footage is supplementary footage, traditionally used to accompany a documentary or TV news story. For example, in an interview with the president of Smith Industries, during an especially dry segment, you can cut away to show the Smith Industries factory floor or show workers picketing the president's office.

B-roll can be shot quickly and is a useful way to enhance your video's main storyline. The more footage you shoot (within reason), the more shots you'll find that can blend well with the main part of your video. Establishing shots of buildings or areas is a helpful way to indicate where scenes take place. *Intercutting* (cutting back and forth) between B-roll and your main storyline can heighten the drama and strengthen the message of your video.

IN THIS CHAPTER

- Choosing editing software
- Getting started
- Editing and polishing your video
- Adding music and sound effects
- Exporting the final version of the video

Chapter 6

Post-Production: How to Edit

Even the simplest modern editing tools are powerful applications. If you want to edit your own videos, expect to spend some time learning how to use your tool of choice. If you've ever worked with Docs or Slides from the Google Workspace, for example, you may recall that you spent some time learning how to use that program. Let's be honest: Most people discover new features and new ways of doing things in these programs all the time.

To edit a video, you need to get familiar with the software and some foundational editing techniques. In this chapter, we explain how to turn your footage into a polished video.

Choosing the Right Editing Software

Editing programs are sophisticated tools for content creation with a lot of powerful features. The best way to approach them is to first read about the basics, or you may even watch a YouTube tutorial to get started. Then just dive in and complete a project. Most people become comfortable using their chosen editing tool during the first few weeks.

The first item to consider when choosing editing software is your existing operating system on your computer. While some programs are supported on multiple operating systems, not all are. Additionally, you *can* edit on your phone or tablet, but if you want the most features and control, the computer is your best ally. If you use Windows, you need editing software for Windows; if you use a Mac, you need editing software for the Mac. Some programs are even available for Linux.

Don't worry, if you want a program that runs on an alternate operating system, there is a workaround: consider loading a virtual machine. There are programs available that allow you to run a virtual computer within your existing one, so if you have a Mac, you can run a Windows machine and vice versa.

Computers versus Phones

Phones allow us to have the world at our fingertips. There's little they can't do. In fact, there are countless programs available — Adobe Rush, Cap Cut, and iMovie — that can turn a mobile device into a portable editing suite. Although these programs are great in a pinch, they cannot hold a candle to the capability and power of computer-based editing programs. Especially if you plan to work with multiple cameras, 4K video, or graphics, a smartphone won't be able to cut it. For those reasons, the remainder of the chapter covers computer editing programs.

Mac tools

In the film and video industries, the Mac is widely considered to be the go-to operating system, despite the selection of available editing tools being somewhat smaller than on the PC. This isn't necessarily bad news, because of the high quality of Mac-based programs:

- **Apple** itself provides two industry-leading editing applications:
  - *iMovie:* Entry level
  - *Final Cut Pro:* Professional level
- **Adobe,** the market leader in creative software, offers a full line of tools for the Mac, including Adobe Premiere.

iMovie

If you have a Mac, iPhone, or iPad, you already have iMovie. This powerful little editing application comes preinstalled on every new Mac product. We highly recommend this for your YouTube video editing because it's easy to use. Figure 6-1 shows a sample iMovie project.

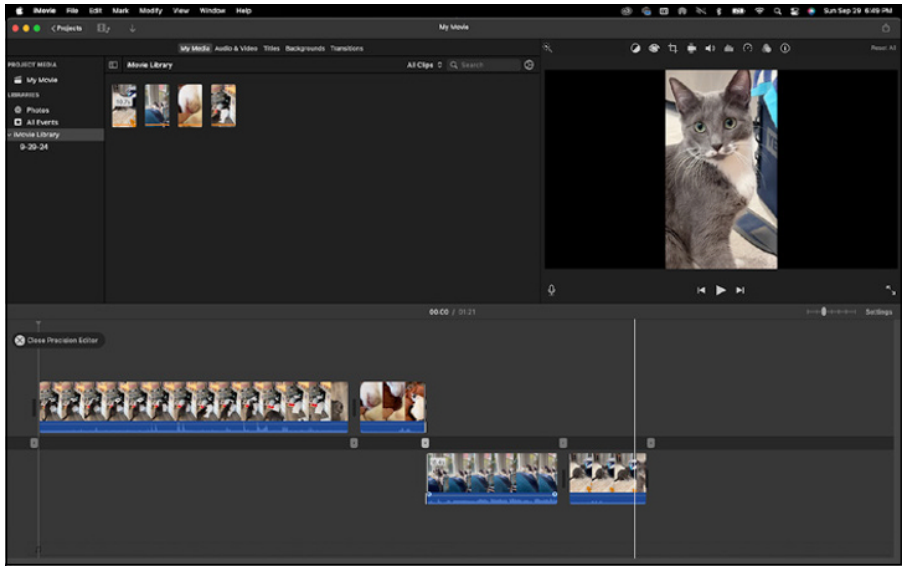

FIGURE 6-1: iMovie has a simple interface, making it easy for beginners.

TIP

Upgrade to the latest version of iMovie, if you can. It's (usually) free to download and update straight from Apple's website: `www.apple.com/imovie`.

iMovie covers virtually everything you need for normal video editing, and it comes supplied with helpful templates for impressive titles and neat visual effects.

Final Cut Pro

TIP

Final Cut Pro is the professional-grade editing application from Apple that covers most capabilities an editor needs. It's used by many professionals, including such legendary editors as Walter Murch *(The Godfather, Apocalypse Now)*.

Final Cut Pro is a major upgrade from iMovie. Its user interface is quite similar to iMovie, and old iMovie projects can be imported directly into Final Cut Pro. It offers much more flexibility, such as unlimited video and audio tracks, many more visual effects, a feature-rich footage management system, and sophisticated audio editing.

If you're going with Apple editing programs, start with iMovie (free for newer Mac users and $14.99 for older computers) and then upgrade to Final Cut Pro X when you run into limitations (a one-time purchase of $299.99).

Adobe Premiere

Final Cut's main competitor — which is available on Mac and Windows — is Adobe and its Premiere editing programs — note the plural form here. You have a choice between two Premiere products:

- **Premiere Elements:** The entry-level Adobe editing program, Premiere Elements is designed for consumers as well as business users. The advantages of using Premiere Elements over the free Apple iMovie program are that it
  - Supports multiple video and audio tracks. (The additional power is useful if you edit more complex projects, such as footage shot with multiple cameras simultaneously.)
  - Offers a more sophisticated way to organize large collections of raw footage.
  - Provides more flexibility in dealing with photos and other images.
- **Premiere Pro:** Premiere Pro, the Adobe program for professional video editors, offers all the same professional features of Final Cut Pro. Figure 6-2 shows a sample interface of Premiere Pro. Some editors like it better because
  - Its user interface is optimized for a professional editor's typical workflow.
  - It has broader support for the file formats that professional and consumer-level cameras produce. It allows you to work with files natively — no transcoding needed.
  - It integrates the workflow as a one-stop — you can take a project entirely by way of the Adobe Creative Suite, including color correction, motion graphics, and audio finishing.

DaVinci Resolve

Developed by Blackmagic Design, which also makes professional digital video cameras, this program is quickly becoming a common tool in many editors' toolboxes. This powerful program is often lauded for its vast and detailed color correction tools, but it boasts something that every beginning editor can appreciate — it's free. Well sort of . . . DaVinci Resolve is free and supports up to 60fps and UHD editing. DaVinci Resolve Studio is available for $295 and supports editing up to 120fps and 32K resolution. If you're budget-conscious, Resolve is a great place to start.

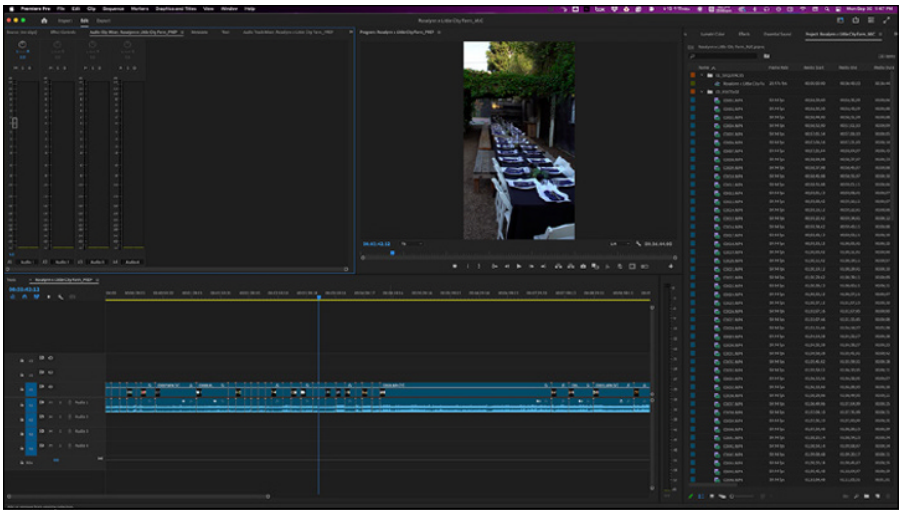

FIGURE 6-2: This is what a video project looks like in Adobe Premiere Pro.

Windows tools

Dozens of editing programs of all sophistication levels are available on the Windows PC platform. The following sections describe a few of the most popular.

Microsoft Clipchamp

Similar to iMovie on the Mac, this free online editing tool covers very basic video editing needs. Microsoft Clipchamp lets you quickly import footage and pictures, arrange and trim clips, add music, apply basic visual effects and titles, and export in HD. There is also a paid version for $11.99 with bonus features including 4K editing. Figure 6-3 shows the opening Microsoft Clipchamp screen. You can access it at `clipchamp.com`.

TIP

This is a helpful way to get your feet wet with video editing. As it is available online, you can simply log in to your Microsoft account (or create one) and begin using Clipchamp straight away.

Adobe Premiere

Like with Macs, both Premiere Elements and Premiere Pro are available for Windows users. These versions are largely identical to their Mac counterparts and are highly respected tools for professionals. See the previous Adobe Premiere section within the "Mac tools" section for more information.

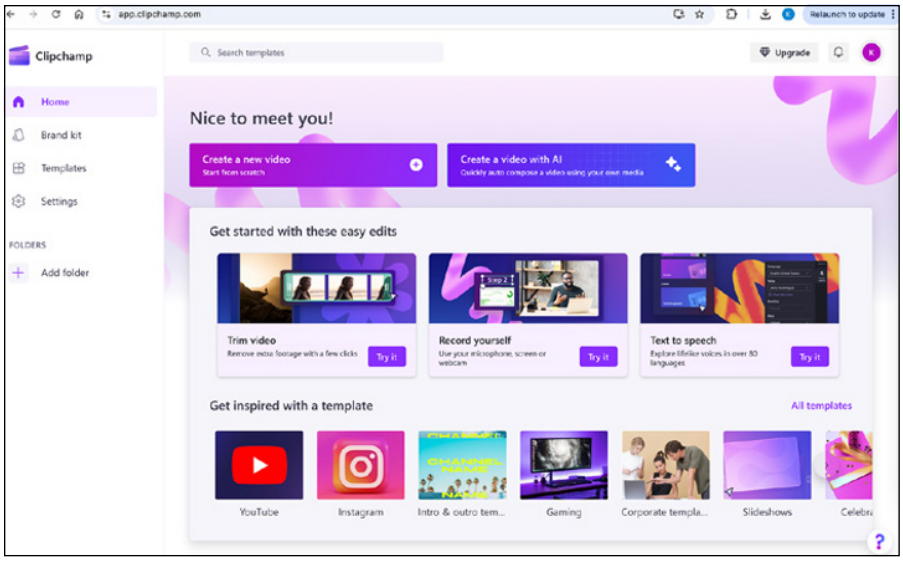

FIGURE 6-3: Opening Microsoft Clipchamp screen.

REMEMBER

Premiere can work with multiple video and audio tracks, which allows for the easy arrangement of footage and complex narrative structures. That's an important advantage over the free Microsoft Photos.

VEGAS

The entry-level Vegas Movie Studio and the more advanced VEGAS Pro are interesting alternatives to Adobe products. They offer features that are comparable to some of the best editing software on the market. If you're looking for the most bang for your buck, VEGAS Movie Studio is affordably priced, and VEGAS Pro will set you back considerably more.

Pinnacle Studio

This product is significantly more sophisticated than Premiere Elements. It boasts unlimited video and audio tracks, animated titles, broad format support, sophisticated audio editing, and a ton of professional-level special effects.

Pinnacle Studio is priced reasonably and is a good choice for people who want to do frequent, sophisticated editing and are willing to endure a bit of a learning curve.

Preparing Your Project

Before you start the edit, a little prep work is needed to get everything in shipshape to save you and your computer a lot of extra work.

Organizing your media

Before working with your footage, it is imperative to organize everything. This isn't limited to your footage either, this goes for music, graphics, VO, exports . . . Every file has a place. Here's a good folder structure for beginners:

- **01_PROJECT:** This is where you keep your main project file.
- **02_FOOTAGE:** Put all video files and synchronized audio here.
- **03_AUDIO:** Keep music, sound effects, voiceover, and other audio files here.
- **04_GRAPHICS:** Good for storing images, stock footage, VFX, or other video assets.
- **05_DOCUMENTS:** Put schedules, scripts, releases, and other "paperwork" here.
- **06_EXPORTS:** For your files that you are ready to share or upload.

TIP

Don't stop at these folders. It's a good idea to further organize into sub-folders. Group clips by camera angle and songs by genre, for example — however feels most intuitive to you. The more organized things are, the faster you can get to editing.

Ingesting your media

Video used to be supplied on magnetic tape. Although it was available in several formats, such as VHS and Betacam, figuring out what you had was fairly simple. The digital world has brought about a dramatic cost reduction (video professionals no longer have to own a VCR for every cassette format), but it also brought about more complexity. Dozens of digital video file formats are now used in the industry.

Fortunately, modern editing programs handle much of this mess for you. Almost all editing tools handle the most common dozen or so formats. But if you work with video footage shot by someone else, you still may occasionally encounter an exotic format. That's why you should understand the basic principles of using video file formats.

Sorting out the file formats

Digital video produces extremely large files. These files would be even larger if not for the heavy compression that's applied to the original video signal. Video compression uses some fancy calculations to squeeze high-quality moving pictures and sound into files that are as small as possible. To give you an idea, your video files would be between 5 and 50 times larger without compression.

The compression process is managed by a *co*der/*dec*oder, or *codec*. This piece of software squeezes the video into a smaller digital format when it's recorded and decompresses it again when it's being watched. Because a codec typically isn't compatible with other codecs, you can't watch a video recorded via codec A on a device that supports only codec B.

Some of the most popular video codecs include these:

- Apple ProRes
- Digital Video (DV)
- H.264 (a more modern version of MPEG-4)
- MPEG-4
- Windows Media (WMV)

The data generated by these codecs is stored in a file that contains additional information, such as the title and description of the video, synchronization markers that sync audio and video, subtitles, and more.

You see these file formats, or *container* formats, on your PC or Mac. The following container formats are the most popular:

- Flash Video (`.flv`)
- MP4 (`.mp4`)
- MPEG (`.mpg`)
- QuickTime (`.mov`)
- Windows Media (`.avi`)

Don't get confused: Container files can contain several different codecs. For example, a QuickTime file can contain a video in Apple ProRes, DV, or H.264 format. Each format can be matched with a number of audio codec formats, such as AAC, AIFF, or MP3.

In other words, if someone asks you for the format of your video files and you respond "AVI" or "MOV," the person doesn't know much more about the format than before they asked. Any container file type can contain dozens of different codecs.

TIP

The only way to determine what you have is to open the video file in a player application, such as QuickTime Player or Windows Media Player. Then use the menu command that shows you details about the file. In QuickTime, it's Window --> Show Movie Inspector. In Windows Media Player, it's File --> Properties (see Figure 6-4).

FIGURE 6-4: Choosing Show Movie Inspector from QuickTime shows the format information about your movie.

Converting formats

Modern editing programs can work with most widely used video file formats. However, if you use footage in a more limited format — material provided by someone else, for example — you may encounter roadblocks. Your editing application may not be able to work with unusual formats directly.

In this case, you need to convert these files to a more standard format by using a video conversion program. Your editing program may even have one.

You can find many free or inexpensive conversion programs. If you have to deal with an exotic video file format, the time savings are definitely worth the price.

- On Windows PCs, AVS Video Converter (`www.avs4you.com/avs-free-video-converter.aspx`) and Any Video Converter Pro (`www.any-video-converter.com/products/for_video`) are good choices.
- On the Mac, AVCWare Video Converter (`www.avcware.com`) and Wondershare Mac Video Converter (`https://videoconverter.wondershare.com`) are recommended products.
- Another good option is HandBreak (`https://handbrake.fr`), a free, open source program that is available for all operating systems.
- If you want to go the way of paid programs, Adobe Media Encoder (`www.adobe.com/products/media-encoder.html`) is an extremely powerful video converter and works well with the rest of the Adobe applications.

WARNING

When it comes to downloading free software off the Internet: let the buyer beware. Many free programs can look legitimate but are actually malware in disguise. We recommend sticking with the ones discussed here or doing thorough research.

Making backups

There's nothing worse than putting a ton of hard work into a project, logging off for the night, and starting up the next morning to see that everything is gone. Catastrophes don't happen often, but it's best to prepare for the worst. It's always a good idea to create a backup of all your media on a separate hard drive or device, that way if something goes horribly wrong, all you need to do is copy and paste, and you're up and moving again. This practice is also good for individual project files, in case they go missing.

TIP

At the end of each session, save the most recent version of your project to that other drive or device. Better yet, each time you sit down to edit a new version of your video, duplicate the project. If you go up a few versions and suddenly realize you need to go back to an old change, having progressing copies will save a lot of headache.

Managing space

Video files take up a lot of space on their own. When you factor in audio, exports, and the software needed to cut it all, space begins to run thin. This especially becomes an issue if you intend on uploading in 4K. It's good to have a large external hard drive to help supplement your computer's storage.

READING BOOKS AND WATCHING VIDEOS

As a starting point for editing video, you may want to read a book about your editing software of choice. A book can help you understand the basic concepts that your editing application is built on, and it can provide a quick overview of all its features. In addition, good books have step-by-step guides for more advanced features.

Several books in the *For Dummies* series explain how to use some of the most popular editing programs, and we highly recommend them.

Apple and Adobe products generally have the biggest selection of good instructional books available, though some of the less popular editing applications aren't covered as thoroughly. Before you decide on a particular editing program, look at what kind of information and support are available for it. Don't forget to check out YouTube for editing tutorials; many creators and channels are dedicated to this topic.

TIP

To save on space, consider only exporting your final video in high-definition and exporting rough cuts at a lower resolution.

Attempting a Test Project

After some preparation, there's no better way to get up to speed in video editing than to simply try it. Select a topic for a test project and put together a simple video about it. This gives you firsthand experience with the editing software before you create your first real video.

If you have some video footage from your last vacation or family event, that's a good place to start, because your family can then enjoy a watchable, well-edited video. Or, if you want to dive right into marketing-oriented videos, shoot some quick footage about your business and use existing pictures.

TIP

Avoid overthinking your first project. Your goal isn't to produce a masterwork of cinematic storytelling — it's to explore the features of your editing tool and experience the basic process of editing.

Follow these guidelines when creating your first project:

- Import, view, and organize multiple clips of raw video footage.
- Use pictures and graphical elements, such as logos, in your video.

- Experiment with different title styles.
- Try variations of background music to see how music can influence the mood of a video.
- Explore basic visual effects, such as transitions between scenes.
- Record a voiceover narration track.

Make a short video first, maybe a couple of minutes long. Don't forget to share the video with a friend for feedback — you'll be surprised at what you notice when you're sharing a project.

Editing Your Video

Editing is the art of telling a story using video footage, pictures, and sound. Editing is often called *the invisible art* because the best editing isn't noticed by the viewer.

A well-edited video brings the viewer into the story; none of the elements of the actual edit should be seen, unless your goal is to show off a digital effect on the footage.

Even when you plan a video shoot meticulously, surprises and changes take place during editing. An idea that seems outstanding at first may not work in the final video. On the other hand, unexpected moments of excellence may show up in your footage to give your video an extra boost.

Editing can make or break your video. This section tells you how to approach this essential process. We use the Apple iMovie editing software in the examples, although other editing programs work similarly.

RECOGNIZING VIDEOS THAT NEED NO EDITING

Some types of video can stand on their own with no significant amount of editing. You can prepare the following types of videos for publishing with a minimal amount of trimming:

- **Talking head:** A talking head video shows a person simply speaking into the camera to make an announcement or explain a concept or an issue. This technique isn't

terribly interesting visually, but it can be effective if the speaker has interesting material. If your talent can complete the statement in one take, you typically don't even need to edit.

- **Speech and presentation:** Sometimes, you can tape a representative of your company or an outside expert presenting a relevant topic at an event. You can typically use this footage without editing if the presentation is brief. But remember that presentations on video tend to be less interesting than the ones you see in person.
- **Simple product demonstrations:** A salesperson, or even a CEO, may be able to give a killer product demonstration in only one take. Sometimes, a charismatic salesperson can be more convincing than a slickly produced product video. Show details of the product by zooming in or moving the camera.

Preparing the project file

After you return from a shooting location, follow these general steps to log your footage — the most important step in preparing for the editing process:

1. **Import the footage into your editing program.**

   You may already have completed this step if you had to convert your footage from an unfamiliar format.

TIP

   If you captured your sound on an external audio recorder, now's the best time to synchronize it with your video. Some programs, such as Premiere Pro, easily allow you to match up audio and video directly on the timeline. Just make sure your camera is recording with its internal microphone or else it won't work!

2. **Get your project settings right.**

   Forgetting to set your project settings (or sequence settings, depending on the program) at the start can cause major headaches down the line, especially when it's time to export. This includes the orientation, resolution, and framerate.

   If the video is being uploaded horizontally, the project's aspect ratio should be 16:9, and if it's for a vertical format, it should be 9:16. Your framerate should match what your footage was shot at (unless you are planning on slowing some clips down). However, it should never be higher than the original footage, as this can cause glitches and playback problems.

   Finally, you want the resolution to match the original footage or be lower. For instance, if you shot footage in 4K, having an HD project can allow you to scale clips up. However, you should never upscale footage (such as from HD to 4K), as this will visually degrade the quality since the higher resolution will just magnify the lower resolution.

TIP

If you're willing to pay a premium, there are an increasing number of powerful AI tools available that can enhance the quality of your clips, stabilize shaky footage, or even change framerates. These programs can be extremely helpful in a pinch, but are really only useful if you plan on using them frequently. Topaz Labs' Video AI 5 is packed with features and updates frequently. It's available for a one-time payment of $299.

3. **Organize your clips.**

   After you have a bunch of clips that cover different parts of your project, start by organizing them to better see what you have. Group clips together that are related to the same scene. Editing programs offer different methods to help, such as

   - Folders or bins in which you can store clips
   - Labels and tags that you can assign to clips
   - Events that group related clips

4. **Watch your footage.**

   Review all your clips to determine what you have. Even if you have a lot of footage, there's no way to avoid this time-consuming step. But with practice, you can learn to shoot more efficiently, meaning you'll have less footage to pore over later.

5. **Remove unwanted material.**

   This is known as *breaking down* your footage. It's a great way of trimming out any of the excess fluff, awkward pauses, and random unwanted moments that always get captured. If you have clips that are clearly unusable, remove them immediately. Don't delete them — just store them in a folder labeled *Unusable* in your editing program or in your computer's file system. Sometimes, a clip that looks unusable now can come in handy later.

6. **Take notes.**

   The best way to find your footage quickly during editing is to take the time to record notes about every clip. Add a few simple words about the content of the clip and its level of quality. In most programs, notes can be recorded in the editing software directly in line with the clip you're referencing.

7. **Mark the best clips or moments in clips.**

   This is known as *making selects*. Your goal is to choose the best take to make it in the video. If you have multiple takes of a scene, mark the one you think is best. Many editing programs let you use a special Favorites functionality, or you can simply make a mark in your notes. Also mark B-roll footage that you think looks good, and make notes of the best sound bites in interview clips. If only part of one take works, clip only that portion and splice it with part of another take to make it work!

REMEMBER

Logging your footage may seem like a tedious and time-consuming process, but investing time in it pays off later. During editing, you can waste a lot of time hunting for a particular clip that you somehow recall but didn't mark properly.

Trimming video clips

Clips often tend to be too long. If you want to use a one-take video, you can simply trim off unwanted pieces at the beginning and the end. Fortunately, trimming a clip on your computer is fairly easy. For example, QuickTime has basic editing features.

If you want to trim a clip, open the video file in QuickTime and then choose the Edit --> Trim command. A timeline showing the entire clip appears. Drag the yellow handles to mark the start and end of the clip, and then click the Trim button. The resulting clip can be saved or exported for use on YouTube or on your website. Figure 6-5 shows the Trim function in QuickTime.

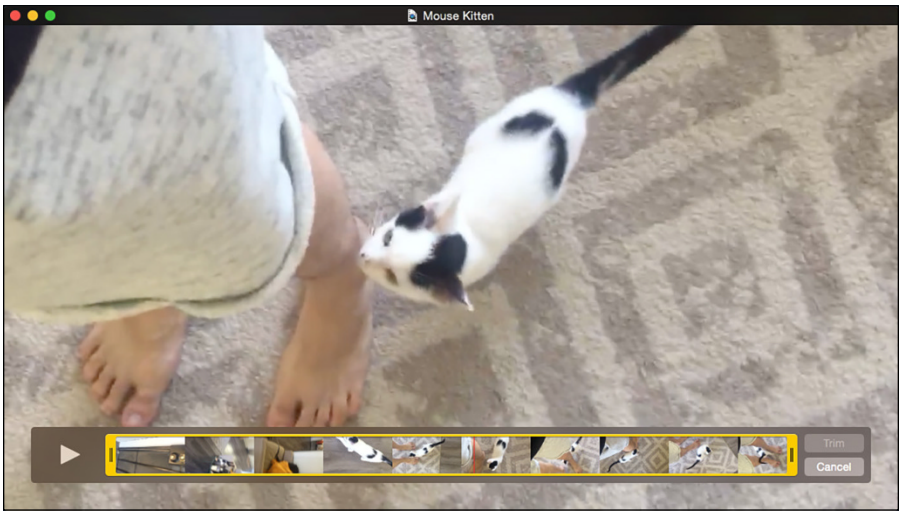

FIGURE 6-5: The Trim function in QuickTime Player.

Some simple video programs even let you assemble multiple clips into a longer clip. For example, QuickTime lets you add a clip to the end of the current clip by choosing the Edit -> Add Clip to End command. As soon as you want to move beyond the simplest trimming level (and save time in the end), invest in quality editing software.

Making a rough cut

The first step in determining what your video will look like is to make a *rough cut*, in which you line up all the good footage to figure out what works. A rough cut is typically much longer than the final product, and it lacks many of the elements from the final video, such as titles and visual effects.

To make a rough cut, first log your footage, as explained earlier in this chapter, in the section "Logging your footage." Then follow these steps:

1. **Review your storyline in sequence.**

   Tackle every scene separately.

2. **For every scene, find the best takes that you marked during logging.**

3. **Mark in points and out points for every clip to trim it to the part you want in the video.**

   In points and out points are indicators you set on the individual clips that make up the scene. An *in point* is the frame in the clip where you want to begin viewing, an *out point* is the frame with which you want to end the clip.

   Don't worry much about the exact timing. That comes later. In points and out points can easily be changed after the clip is in your timeline.

TIP

4. **Insert the clip in your editing program's timeline, in any order you want.**

   Figure 6-6 shows what a rough cut looks like in an editing program. It's just a sequence of clips with no further treatment.

5. **Repeat this process for all scenes to assemble a sequence of clips that tells your intended story.**

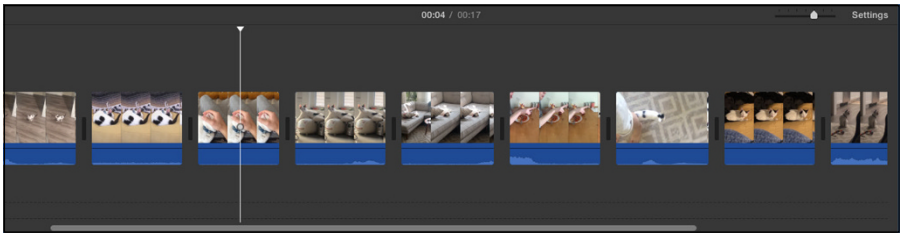

FIGURE 6-6: A timeline with a rough cut in iMovie.

When you watch your rough cut for the first time, it probably looks bumpy, overly long, and <ahem> rough. Your goal is simply to figure out how well your material works when it's assembled.

TIP

If it's possible in your editing program, make a safety copy of your first rough cut — of either the timeline or the whole project. This copy may come in handy later in the editing process, when you don't see the forest for all the trees, and you need a fresh perspective. Making a copy can also be a helpful way to find raw clips quickly if you have a lot of footage.

Switching it around

The great thing about modern editing software is that you can experiment by moving clips and entire sequences to find the best combination of clips and scenes. Be careful: You can easily get lost in the experimentation process. First, consider why you would want to change something, and if you have a truly good reason, do it.

Try some of these suggestions:

- **Use different versions of the same take.** Sometimes, a take that you think is best when you watch it in isolation no longer works well with the rest of the material. If you're unhappy with a take, try using a different take of the same shot to see whether it improves the entire scene.
- **Drop clips or entire scenes.** Shorter is typically better in editing. If you feel that a particular clip or an entire scene doesn't add much value to the video, drop the clip entirely and watch the video without it. If you don't miss it much, your audience will likely never miss it.
- **Change the order of scenes.** Particularly in documentary-style and educational videos, scenes don't necessarily have a natural fixed order. You can also change the sequence completely for dramatic effect. For example, if you sell lawn mowers and you want to show how your latest model performs, you can grab your viewers' attention if you first show the pristine lawn that results from using your product and then demonstrate how your product was responsible.

REMEMBER

Editing is storytelling, but stories don't always have to flow linearly. Early in your video, specify to the audience that you have something interesting to say. Learn from the pros: James Bond movies, for example, don't start with a boring explanation of the villain's latest evil plot, but rather with a high-octane action scene that grabs the audience's attention immediately.

Creating cuts

A rough cut is all about finding the right way to tell a story with your video. In a written document, the rough cut is the equivalent of the outline and first draft. But there's more to editing: Just as you would refine a written text for style and powerful language, refine your video edit with better timing, transitions, additional material, and refined cuts.

Working on these elements is the style aspect of video editing, and it makes all the difference between a video that's barely watchable and one that excites viewers.

A *cut* in film editing connects two shots. One shot ends and the next one begins, and between them is a cut. The word *cut* comes from the act of physically cutting celluloid film in traditional movie editing. Today, in the age of digital editing, no cutting is taking place, though the name stuck.

Different types of cuts serve different purposes. Depending on the effect you want to achieve, use one of these cut types:

- **Hard:** This is the most basic (and by far the most frequently used) type of cut. One shot ends, and the next shot starts immediately. Both the picture track and the sound track are cut at the same time.
- **Transition:** One shot flows into the next with some kind of visual effect. The simplest form of transition is the *fade,* which softly transitions one picture to the next. You can use many different types of other transitions, some of which can look quite elaborate. Use transitions with caution because the editing should be felt, not seen. You don't want to take away from the viewing experience with starburst transitions every minute.

  TIP

  Use transitions to suggest a special relationship between two shots, such as a scene transition.
- **Cross-fade:** This cut type can be used between shots as a softer replacement for hard cuts. If you want to edit to slow music and achieve a flowing pace, the fade is a useful technique.

  Figure 6-7 shows what a cross-fade between two shots looks like in the context of a video. On the bottom, you can see the timeline with the vertical bar that shows which part of the video is playing. On the top, the preview pane shows the two shots that the cross-fade combines.
- **Jump:** Cut from one view of a person or an object to another one that's only slightly different. You should generally avoid using the jump cut, but it can be used occasionally for dramatic effect. It's also used in interviews or talking head videos to shorten a statement or to add visual variety. For example, the person who's speaking can be shown in a medium shot while you cut to a slightly tighter shot for the next sentence.

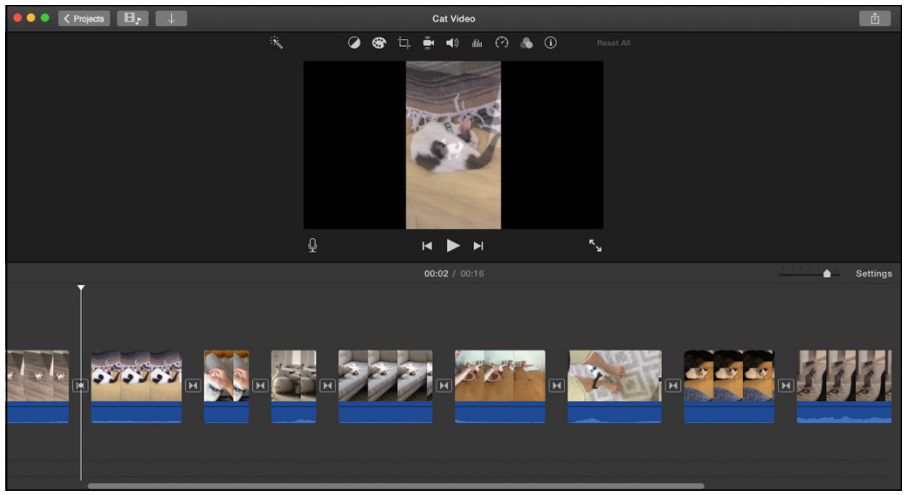

FIGURE 6-7: A cross-fade transition in an iMovie timeline.

Your rough cut probably uses plain hard cuts exclusively, but as you start refining your video, consider using these other types of cuts to help advance the story and make the viewing experience more sophisticated.

TIP

Many beginners in video editing overuse fancy transitions. Modern editing programs are supplied with dozens of different transitions, and spicing up a video with all that eye candy is tempting. But don't forget that most viewers are more impressed by good storytelling than by overused special effects. A good rule of thumb is that 95 percent of your cuts should be plain hard cuts. If you use more than a handful of fades in your video, you're probably overdoing it.

Filling the gaps with B-roll

The term *B-roll* describes supplemental footage that can be used to provide additional context for the viewer or to fill gaps in the main storyline. Having plenty of good B-roll is always a good idea because it makes an editor's life easier.

Use B-roll in your video in these common scenarios:

- To illustrate what a speaker or an interviewee is saying by showing the subject of the explanation.
- To add a bit of rhythm and visual polish to an otherwise long and visually boring scene.
- To separate scenes in a scripted video to give the viewer breathing room. Many TV series use a few pieces of B-roll between scenes — for example, in shots of the city where the story is taking place.

- To hide cuts in an interview or another continuous scene. If you have only one perspective of an interviewee, shortening the interview is difficult. Cutting directly looks jumpy and indicates that you've omitted material. If you cut instead to a piece of B-roll while the interviewee is still talking, you can easily mask the cut.
- To disguise small flaws in the footage. Did the camera suddenly shake in the middle of the interview, or did the subject move briefly out of focus? No problem — simply use a bit of B-roll to hide the mistake.

REMEMBER

If you use B-roll only to disguise mistakes, your use of it may become too obvious. Use B-roll frequently to make your video more interesting and varied. But also avoid using B-roll that has nothing to do with the subject and doesn't add true value.

TIP

Stock footage can be a great way to add B-roll without having to shoot extra content or to simply supplement what you've already shot. While there's a wide variety of stock footage available online, not every shot or subject is available due to copyright rules, so you may need to get creative or abstract to make things work.

Polishing Your Video

After you refine your rough cut into a well-timed, well-trimmed video, it's time to apply the final layer of polish. A bit of further fine-tuning makes the difference between an acceptable video and one that looks truly professional.

Fine-tuning your edit

Videos can benefit from a number of relatively simple steps you can follow to improve certain aspects that viewers may not even consciously recognize:

- **Tweak your cut timing.** If a cut seems even a little bit off, spend some time fine-tuning it. Even placing a cut a frame or two earlier or later can make a difference.
- **Add music.** You may have already worked with some temporary music tracks during earlier editing steps, but now is the time to finalize all your audio and background tracks.
- **Clean up the audio track.** Most audio tracks can use some additional work. Be sure that the levels are correct and consistent throughout the video.

Viewers don't like viewing one scene that's too loud followed immediately by one that's barely audible. Some editing programs have the Normalize Audio function, which optimizes audio levels automatically. Also, hard audio cuts rarely sound good. You can add a dissolve transition to the audio track while still applying a hard cut to the picture track.

- **Use color correction.** Scenes in general should have a consistent look between shots — different video cameras can pick up different color influences. The color correction feature in most editing programs helps fix color inconsistencies between shots and scenes. Color correction also lets you give your video a unique and more interesting feel. For instance, bluer light or colder light is used in many crime scenes, whereas more yellow or warmer light is typically used in more romantic movies.

Adding bells and whistles

You can add a number of elements, as described in this list, to complete your video and make it look more interesting:

- **Titles:** A video should have a good title sequence, and editing programs offer a variety of different templates. Try a few different styles to see what works best. A general rule for any text onscreen is that viewers should be able to read it quickly twice. Be sure your title sequences aren't too long and that the text is a legible size — viewers on YouTube typically have less patience than viewers in the movie theater.
- **Sound effects:** A well-placed sound effect can make certain scenes much more interesting. We aren't talking about explosions, alien ray gun sounds, or Wilhelm screams, but rather about basic background tracks or sounds that match the visible content on the screen. Sometimes, your original background sounds for a scene aren't good, and you can use canned sounds to replace them. Some editing programs come with small libraries of sound effects, and you can find more online.
- **Visual effects:** Most editing programs have effect filters that change the look of your footage completely. Though you should always use these effects sparingly, they may occasionally help make your video look more interesting.

TIP

You can experiment with bells and whistles in the earlier stages of the editing process, though you typically should wait until the end of your editing process before trying to use them fully. They're typically time consuming to apply, and if you change your edit afterward, you may have to do unnecessary work.

Adding Music to Your Video

You may wonder why music is even necessary in a video that isn't destined to sell a pop singer's latest album. Music determines a lot about the perception of your message because viewers make split-second, subconscious judgments about the content of your video depending on the type of music you choose.

In contrast to music videos, the music in your marketing video is meant to complement the message you're trying to convey. Music isn't the focus of a video — it's there simply to add color.

WARNING

You must understand the difference between music you pay royalties to use and royalty-free music. Most of the music you hear on the radio or buy online is copyrighted and can be used in videos only if you pay royalties to its record label — often an expensive strategy because you must pay for every use of a copyrighted music track. Record labels sometimes even charge more, depending on how many views your video attracts. And, "borrowing" music and hoping that you won't get caught is *not* an option. Videos containing copyrighted music can be detected and banned automatically from sites such as YouTube (and your account may receive a strike as a result).

The easiest way to save time and expense is to use only royalty-free music tracks — they're sold specifically for use in YouTube videos or presentations. After you pay a fixed price per song, you can usually use it however you want, as long as you stay within the boundaries specified by the music publishing contract. For example, some royalty-free tracks may be available for use in online videos but not in TV commercials. To choose music for your video, follow these steps:

1. **Determine which emotion you want to convey.**

   For example, you may want viewers to feel happy, sad, or uplifted — or neutral.

2. **Watch a rough edit of your video several times.**

   Or, if you're still in the planning stage, simply review the video's storyline in your mind. Do you need fast, aggressive cuts? Are your graphics clean and simple or more elaborate and flowery? The music you choose must match the video's storyline, aesthetic value, and editing style.

3. **Choose an appropriate genre.**

   You may want to use a rock-and-roll track or a country track, for example, or perhaps electronic music more closely suits your style.

4. **Set the mood.**

   The mood of the music you choose has to match the emotion you want to convey. To judge, determine how the music makes *you* feel when you listen to it. If it matches the emotion you chose in Step 1, you're on the right track.

5. **Control the pace of the video by controlling its musical tempo.**

   A song's *tempo* refers to its speed or pace. The pace of the video also has to fit the emotion you're trying to convey and the overall storyline. For example, should viewers be relaxed or breathless after watching your video? Choose a tempo between these two extremes that creates the impression you want.

6. **Search for a song.**

   After you choose the genre, mood, and tempo of the music in your video, search for a song. (You'll find out more about music to purchase in the following sections. Or, if you're truly talented, compose one yourself.) You'll likely stick with royalty-free music.

7. **Drop in the music.**

   After you finish creating the video, you can drop the music into your editing timeline and edit the piece to mirror the pacing of the footage.

Adding built-in music in video editing tools

Most of the video editing software programs we describe in this chapter contain royalty-free song tracks. For example, Apple's Final Cut Pro has over 1,300 royalty-free sound effects and music tracks.

WARNING

Some of the songs you can use from video editing software are so popular and overused (because they're free) that you risk triggering unwanted reactions from your audience. For example, a friend once complained to us that his video reminded him of a late-night TV ad containing questionable content. When we watched it, we found that the video editor had used a free, built-in music track that's often chosen by these low-cost advertisers.

Incorporating stock music libraries

If you have only a small budget and you want to sound different from the standard music libraries that come with many editing programs, you can find a good selection of royalty-free stock music to download online. This list describes some options we recommend:

- **PremiumBeat** (`www.premiumbeat.com`): This one has a huge selection of audio tracks and sound effects. These folks, who work closely with composers

from around the world, are selective, so it's easier to search the libraries for what you need.

- **Audiojungle** (`https://audiojungle.net`): It's less expensive than Shockwave-Sound (`www.shockwave-sound.com`), the major player in the stock music and sound effects derby, but its selection isn't as large. Songs cost between $10 and $20 apiece.
- **Storyblocks** (`www.storyblocks.com`): A subscription-based, royalty free library, Storyblocks has a great selection of sound effects, music, and handy looped tracks for easy editing.

TIP

If you want to use an iconic song such as Nirvana's "Smells Like Teen Spirit" and you have a limited budget or limited time to secure the rights, you can often find inexpensive but similar-sounding songs on stock music sites.

TIP

If you can't find a song that matches the length of your video, don't worry: Viewers don't focus on songs — songs simply enhance the pacing and mood. Therefore, a repetitive song, or looping a song to fit the length of the video, usually works well.

Putting music in your video

After you have selected your music, it's time to insert it in your video.

The mechanical aspect of this task is easy to complete. Follow these steps in your editing software:

1. **Gather all the music you want to use into one folder on your computer.**

   Using one folder helps you find files easily and helps you back them up after editing.

2. **Import the music files into your video editing software.**

   Most editing programs can process MP3 files and most other commonly used music file formats.

3. **Add an audio track to your editing project.**

   Certain simpler programs, such as iMovie, have predetermined tracks for background music.

4. **Drag-and-drop your music piece to the new audio track. Then shift its position until it fits the timing you want.**

5. **Watch the part of the video that now has background music in context.**

   Fine-tune the timing of the music, if necessary.

TIP

If you aren't sure which piece of music will work best with your video, simply import into your editing program multiple music tracks that you're considering. Drop one after the other on the audio timeline, watching the video with every piece of music, to find which track you like best.

Adding emotional impact

The main purpose of your music selection is to enhance the emotional impact of your video. Even the specific way in which you use music in your edit affects the video's emotional impact. Try these simple tricks to give your music more emotional impact:

- **Work with the volume level.** Music in a video shouldn't always play at the same volume level. It should be softer and drop into the background whenever it supports dialogue or a voiceover narration, and it should be fairly loud when it stands on its own and drives home an emotional point. Most editing programs let you change the volume of a particular track over time. Dramatically increasing the volume of the music track in a key video scene adds quite a powerful effect — Hollywood movies and TV shows do it all the time.
- **Determine the proper timing.** A music track doesn't have to start at its beginning when you insert it in your video. Match the music to the video's visual content. Most musical selections have *hooks* — particularly remarkable and recognizable parts. For example, the hook of Beethoven's Fifth Symphony is the famous "Ta-ta-ta-daaa." Try to match musical hooks with important moments in the video.

Cutting your video to music

When you have a piece of music that matches well with the emotional purpose of your video, fine-tune your edit to maximize the effect of the music. For example, you can extend a scene slightly to fit the most dramatic moment with a remarkable hook in the music.

Most editing programs let you lock your music tracks to avoid their being affected by other changes in your video. Follow these steps:

1. **Put your musical piece on its own audio track.**
2. **Time the music so that it begins exactly where you want.**
3. **Lock the music track.**

   Most editing programs use a tiny Padlock icon to indicate locking.

4. **Watch the video and determine how to adapt the timing to best fit the music.**

   For example, cut or extend certain shots slightly.

5. **Make your editing changes.**

6. **Unlock the audio track.**

TIP

Precisely matching cuts in a video with beats in the music can create quite a pleasing effect because the picture and music then seem to move in perfect harmony. Avoid overdoing it, though, because an exact match can quickly bore viewers. The best approach is to match a couple of cuts with the music and then purposely skip the next few cuts before matching again. Alternating makes the final product less predictable and maintains viewer interest.

Cutting your music to video

You may not want to alter an edit just to better fit the music. In this case, cut the music to match your video instead.

Another important reason to cut music is to omit parts that may not fit well with the visual side of your video. For example, the piece of music you selected may have a bridge section that has a slightly different mood from the rest of the track, which can be distracting in a video. Eliminate the unwanted section by cutting precisely at the end of the previous part and at the end of the bridge section.

Almost all video editing programs let you cut audio tracks, which is good enough for completing the basic editing of your music tracks, such as cutting off to the millisecond any unwanted intros or endings.

TIP

An alternative is to cut your music tracks in advance by using an audio program such as Garage Band or Pro Tools. They let you edit audio precisely, and they provide a wealth of audio effects to help you enhance your music tracks for video use.

Incorporating Voiceover and Sound Effects

Many videos used for marketing employ *voiceover narration*, using offscreen narrators to tell viewers about the company's products or services. Most video editing programs have a voiceover recording feature, which is useful if you're recording your own voice directly into your computer. Many stock audio websites have also started implementing AI voiceover generators, which can be useful in a pinch.

TIP

To record your own voiceover, invest in a mid-quality external microphone. You can buy good USB microphones for well below $100 — a worthy investment because your voiceover tracks will sound much better.

As with voiceover narration, you can also add sound effects. Most noises you hear in a typical Hollywood movie aren't recorded live on the set, but are added later in the process. Recording sounds on location is tricky and often creates mediocre results.

So, sound effects are most often added during the editing process. This list describes the major kinds of sound effects that you can use:

- **Background or ambient:** Continuous background noises that suggest where the video scene is taking place work well to establish location. For example, a busy city scene needs vehicle noises, lots of footsteps, and the occasional siren. A beach scene needs wind and water sounds. These background sounds are easy to apply.

  TIP

  If you can, record a few minutes of ambient sound on your video set to capture the audio character of the location.

- **Hard:** This type of sound effect accompanies visible events onscreen, such as slamming doors or passing vehicles. This type is a little more difficult to apply because events must be synced precisely to the picture, though most editing programs let you do it quite easily.

Most advanced video editing programs are supplied with a small library of basic sound effects that you can easily use in your edits. Just add an audio track, drag in the sound recording you want, and shift the track around until it fits the scene.

TIP

You can find additional sound effects online from stock sound libraries such as Storyblocks (`www.storyblocks.com`) and Soundsnap (`www.soundsnap.com`). Most of these sounds have specific descriptions, such as "Cars passing by at 25 mph on a somewhat busy street," so you can likely find something suitable.

Exporting the Final Version

When you finally finish editing, you export the video from your editing program so that you can use it later.

Typically, you should export multiple versions of a video because you can use the final product in different ways:

- **Export an archive master copy with the highest possible quality that your editing program offers.** You can always decrease, but not increase, quality (and therefore file size). That's why you should store a high-quality copy, in case you want to create other versions later.
- **Keep a copy just for YouTube purposes.** YouTube export settings are always changing, so be sure to double-check the current best practices for settings directly on your YouTube channel upload page. Typically, the settings look like this:
  - *Container:* mp4
  - *Audio codec:* AAC-LC
  - *Video codec:* H.264
  - *Acceptable and common framerates:* 24, 25, 30, 48, 50, 60 frames per second
  - *Aspect ratio:* YouTube supports videos of all aspect ratios, including 9:16, 1:1, and 16:9: 1080x1920, 1080x1080, and 1920x1080.
- **Export a copy with the highest possible quality that your editing program offers, but with all the text graphics turned off (if you used any graphics).** Saving this "textless" version can help with making adaptations down the line.
- **Export each type of audio as a separate track, known as *splits*.** So, export all of your dialogue as one file, all the sound effects as another, and all the music as the final one. Say someone asks for a copy of the video, but they don't want the music. With split tracks, you can quickly provide them with the necessary audio and sound effects.

REMEMBER

This is where forgetting to set up your initial project properly can come back to haunt you. Most issues will rear their head when it comes time to export.

Storing your videos

Once you have all the exported versions of your video from the previous section, put them into long-term storage. And at this point, you should be safe to delete your original footage to free up some much needed hard drive space. If, down the line, you decide to do something else with the video, you have everything you need: a copy without text, split audio, and final copies. With these, you can make all sorts of additional assets like trailers, cutdowns for social media, and other promotional content.

Creating adaptations

Having high-resolution, textless final exports of your video is great for creating promotional content for other platforms, especially YouTube Shorts. If your content was originally shot in 16x9, it will easily scale to 9x16. Create cuts of small moments like bloopers, one-liners, or jokes and use them as promotional content to drive traffic to your video and channel! A single video can become multiple assets with the right finessing.

TIP

Most of the editing programs discussed in this book let you directly upload video to your YouTube channel. Uploading this way is convenient, but if you notice a mistake after uploading the video, you have to remove it, which can be a hassle. Normally, exporting video to your hard drive first is recommended for backing up and testing purposes — watch it one last time, and then upload it manually to gain more control over every step.

IN THIS CHAPTER

- Preparing your YouTube channel for video uploads
- Putting video search engine optimization (video SEO) to work for you
- Recognizing what's required to keep your channel in good standing
- Setting appropriate defaults for YouTube's uploading options
- Posting and removing videos from YouTube

Chapter 7
Preparing for Upload Day

It's hard to believe that, not that long ago, the whole concept of video production and distribution was the domain of specialized professionals. In those bad old days, the entire process was not only difficult but often also extremely expensive. Securing broader distribution rights required lawyers, which added another level of complexity and expense, all in the name of locking out lots of creative folk, as well as many businesses, who were just dying to create great video work.

Fortunately, all that has changed. As computers, mobile phones, cameras, and applications became more powerful — and affordable and a lot less complex — it became relatively easy to create a fabulous video. So much for the miles of film and the expensive production facilities that used to be standard operating procedure — now you could shoot an outstanding video on your mobile phone and upload it immediately for your audience to watch. If you have a video that is more complex, you could edit it on your laptop in the local coffee shop. The digital video revolution had begun.

Then along came YouTube, and suddenly you could get your video *immediately* distributed to, and placed in front of, millions of viewers without the aggravation of contracts, lawyers, and distribution partners. Overnight, you could become

your own Hollywood studio. YouTube made it powerful and easy by making simplified, video self-publishing a reality. It eliminated nearly all the crazy video file-format issues and removed the complicated conversion issues so you could simply upload a file and people could watch it nearly everywhere with no special software required.

REMEMBER

Today, video is simpler than ever. But don't be deceived by its simplicity: YouTube gives you powerful tools to do great things with video uploading and distribution from nearly any connected device. So start off simple and hit the ground running, but be sure to leverage YouTube's additional distribution capabilities as your skills and your channel mature.

Preparing Your Channel for Uploads

Chapters 4, 5, and 6 guide you through the process of setting up, capturing, and editing great videos for your channel. If you've made your way through those chapters, you may be thinking that you're just a few clicks away from uploading a video, and you'd be absolutely right to think so. That's the great part about YouTube — it makes it easy to get your videos online. However, being successful on YouTube requires a bit of planning, so don't rush. Even *Shorts*, spontaneous vertical video that can be uploaded from a mobile phone, should be in line with your channel goals. The time you invest now in preparing your channel for uploads not only makes your future work easier but also sets up your channel for much better watch time, subscription growth, and audience engagement.

Checking your YouTube account hygiene

YouTube certainly started a revolution in online video by making it amazingly easy to upload and share content. But there's something more: YouTube is also a community that abides by certain guidelines to maintain order and civility. These rules are divided into two categories:

- **Community guidelines:** YouTube is a great place to share your work and do business, but just like your physical community, certain rules govern everyone's behavior — rules that usually have something to do with the type of content you can upload. Just keep in mind that viewers can (and do) use the Watch page to flag what they consider to be community violations. Viewers don't have the last word here — YouTube reviewers review the flag to make sure that the complaint is legitimate — but violations can lead to warnings, known as *community guideline strikes*, being issued against your YouTube account.

- **Copyright policies:** Individuals and businesses are strongly encouraged to upload content they own or have legal ownership of. This includes both audio and visual content. Uploading content you have no legal ownership of — or content where the legalities of ownership are murky — can be cause for more strikes against your account. Acquiring three copyright strikes results in account termination. (Copyright issues can be complicated; for a closer look at YouTube's take on copyright issues, check out `https://youtube.com/about/copyright`. For our take on copyright, check out Chapter 16.)

  Copyright violations can be flagged one of two ways:

  - *Copyright strike:* A *strike* is a legal request by a copyright holder directing YouTube to take down the video and remove it from your channel.
  - *Content ID claim:* YouTube grants some users access to an automated copyright-verification system and database known as Content ID. Claims in Content ID don't result in a strike, because the system gives the copyright owner some control over what to do with violations, such as monetization or blocking.

TIP

Deleting a copyrighted video does not make the claim vanish from your account. You need to wait for the claim to expire in 90 days, get the owner to retract the claim, or dispute it with a counternotification. Be diligent in resolving the issue with YouTube or the claimant.

Your success at following these rules defines your account status in YouTube:

- **Community guideline strikes:** The repercussions of this type of violation grow more severe with each successive incident. On the first strike, you lose for one week the ability to customize thumbnails; create, add, or remove playlists; and post or upload in any way. A second strike results in the same punishment, but for two weeks rather than one. Your account is terminated if you receive a third strike within 90 days.

  TIP

  Certain content that would normally violate community guidelines may be allowed to remain visible and without strikes if it's considered "Educational, Documentary, Scientific or Artistic," or simply EDSA. EDSA content is reviewed on a case-by-case basis, but there are still certain guardrails that prohibit extreme content. Updated information can be found at `support.google.com/youtube`.

- **Copyright strikes:** This type of violation operates a bit differently. On your first strike, you have to go to Copyright School to complete a brief questionnaire quizzing your understanding of YouTube copyright policies. Your ability to monetize videos and livestream may also be impacted. If you receive three strikes within 90 days, your account is terminated.

Checking your YouTube account status is simple:

1. **In your web browser, go to `studio.youtube.com`.**
2. **Log in to your YouTube account.**

   You should now be in the YouTube Studio Dashboard that is highlighted on the top left menu bar. If there are any copyright strikes, you'll see a notification card on the top left of the Dashboard. Clicking on the card will display which videos are at fault and what actions you have to take.

REMEMBER

Just because you have a copyright issue doesn't mean you get a strike. Copyright is a thorny issue if you're producing work that uses other video and music. See Chapter 16 to learn more about this important topic in much more detail. Most users won't have any issues, but when it does arise (because there's background music in your video or Short for example), you'll know what to do.

TIP

If you end up on YouTube instead and not Studio, you simply need to click the round channel icon on the top-right of the YouTube window and select YouTube Studio.

3. **Below the Dashboard icon, click the Settings gear icon.**

   This is where you check your channel to make sure all the features you want are enabled.

4. **From the popup, click Channel.**

   You'll be presented with several selections on the left side. Most of these are straightforward, but make sure your channel is in good standing so you can use all the powerful functions of YouTube for your channel, which we take you through shortly.

5. **Select Feature Eligibility.**

   Make sure all three categories — Standard, Intermediate, and Advanced — have no warnings, as shown in Figure 7-1. It's okay if some are not enabled yet. Well discuss enabling them later in this chapter.

6. **When you're done, click the Close button.**

   You'll return to Creator Studio.

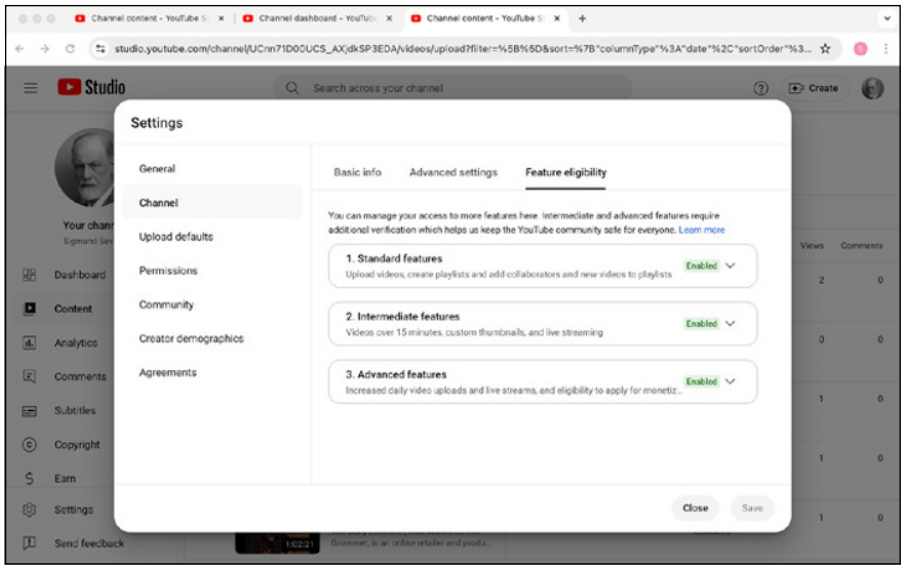

FIGURE 7-1: Your YouTube Channel features.

TIP

If any of your videos have been flagged, for either community guidelines or copyright violations, you probably received an email explaining why. To see more details on the nature of the claim and how it impacts your video, follow these steps:

1. **In your web browser, go to `studio.youtube.com`.**
2. **Log in to your YouTube account.**
3. **Click the Content icon on the left menu.**

   Figure 7-2 shows video content, some of which have claims.
4. **Videos with any sort of violation specify the nature of the problem in the Restrictions column.**

   You can limit the list to only those videos with copyright claims by clicking Filter and then choosing Copyright.
5. **Hover the mouse cursor over the restriction and click See Details.**

   You can then see the details of the claim, including how it impacts your channel, the video's visibility, and its monetization. You can also view which components of the video have a claim against them.
6. **To take action toward a claim, click the Select Action dropdown menu.**

   You're given a choice of various actions to take in response to the claim, including trimming the video, swapping the music, and disputing the claim.

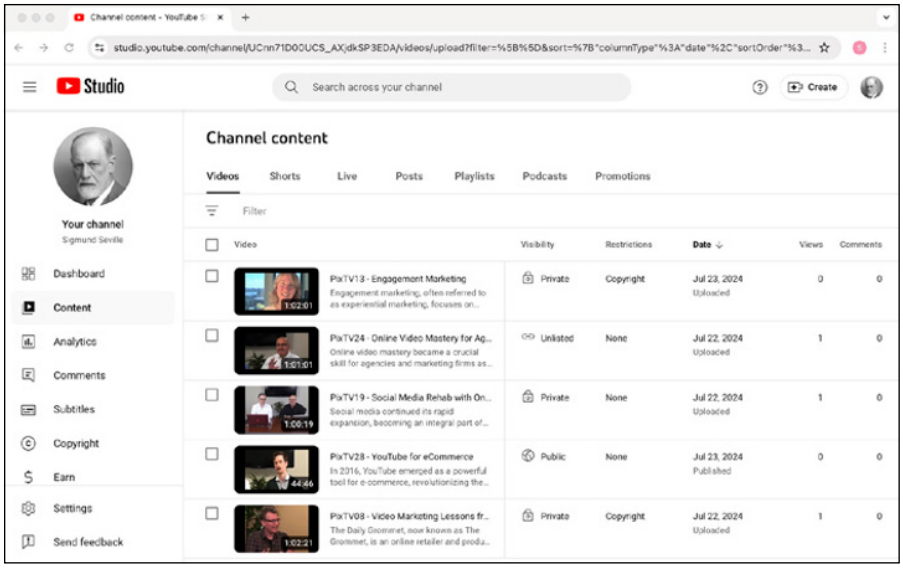

FIGURE 7-2: YouTube Channel content with claims.

Enabling channel features

After you verify that your account is copacetic, be sure to check the rest of the fields on your channel's Feature Eligibility page. Checking which YouTube features are enabled is straightforward:

1. **Log in to `studio.youtube.com`.**
2. **Below the Dashboard icon, click the Settings gear icon.**
3. **From the popup, click Channel.**
4. **Select Feature Eligibility.**

   You need all three feature groups to be enabled. Each group, if not enabled, requires some verification, outlined here:

   - **Standard features:** This gets you started. It includes video uploads, playlist creation, collaboration, and more. The requirement is that your channel must have no community guideline strikes.
   - **Intermediate features:** This is important because it allows you to upload videos longer than 15 minutes, create custom thumbnails, and perform livestreaming. The requirements are for you to have standard features enabled and a verified phone number.

- **Advanced features:** Here is the fame and fortune section for creating more videos, managing Content ID claims, advanced embedding of videos, eligibility for monetization, and more. The requirements include both previous features enabled and advanced verification via video, government identification, or channel history.

5. **Click to enable the feature you want to add to your channel.**

   For example, if you want livestreaming, click the Enable button on the Intermediate feature and follow the setup rules for verifying your phone number.

Tending to Video SEO Matters

In Chapter 15, we explain the concept of *discoverability* — helping YouTube get your content in front of the right viewers through recommendations and search so they watch *your* content rather than somebody else's. Though watch time is a critical part of YouTube's recommendation engine, a video's *metadata* — its title, description, and tags — plays an important role in getting the video found in the first place. Other factors, such as compelling thumbnails, well-orchestrated playlists, captioning, and community engagement matter, too.

Video search engine optimization (*video SEO*, for short) is all about telling YouTube something about your video. For traditional web SEO, search engines such as Google, Bing, and Yahoo! analyze the content on your site, figure out what is important, and then offer up your content to the most relevant searchers. Over time, these search engines have factored in elements such as links, sharing, and clicks to determine how popular particular content ended up being on the web.

YouTube doesn't work like web SEO because it can't (yet) watch your content to determine what your video is about. (Expect advances in AI to change that in the near future!) For now, it has to rely on your metadata and how the community reacts by way of watch time, social media shares, and embedded links for the video on external sites. By the way, Chapter 14 dives deeper into the roles of AI, including how you can use it for SEO assistance.

REMEMBER

It's a lot easier to get your video SEO house in order upfront rather than deal with it after you've published all your content.

What exactly do we mean by *optimization* in *search engine optimization? Optimization* is about intelligently and systematically putting together a proper description of your video so that

- YouTube understands what your content is about in order to better offer your video to the most appropriate searchers.

- Search engines such as Google, Bing, and Yahoo! understand your content and are thus in a position to add your videos to search engine results pages along with web content.
- Viewers are more likely to click on your content versus other search results offered.

These are the goals you want to achieve. The next few sections spell out how you can achieve them.

REMEMBER

A bit later in this chapter, you find out where and when to enter information about titles, descriptions, and other important metadata associated with your video. It's important to understand the principles behind all these before you actually upload.

Adding descriptive titles

The video title is the most important piece of metadata that you create. As important as the title is to YouTube and the major search engines, you have to also ensure that it works for people. The trouble is that it can't look as though you're trying too hard to grab folks' attention. Exaggerated, inaccurate titles, such as *You won't believe what happens to the 12 kittens in this video,* may generate more clicks, but the search engines won't bite, and they will likely ignore your content. Also avoid "breathless" wording such as *most epic* or *blow your mind.* Remember that keywords are important, and that includes using accurate and effective ones in your titles.

TIP

Strike a balance between attracting humans and attracting search engines when you create and optimize a title for a video.

Your title appears in many places:

- On the Watch page under the actual video
- In a YouTube search
- In Google, Bing, and Yahoo! searches
- As part of a playlist
- Under YouTube recommended videos

Selecting a title isn't complicated, but you must be somewhat methodical.

REMEMBER

Though you can use 100 characters in a video title, only 70 characters show up in search results on a desktop computer, and some mobile devices show only about 40, so you have to make the characters count. Titles on recommended videos are further truncated. You can create a longer title, but it's visible only on the Watch page. The goal of video SEO is to attract viewers to the video in the first place. Limiting the title is no good either because it may impair search algorithm matching.

Use the following approach to pick a title:

1. **Determine the keywords.**

   These are the important words that people search for. Make sure they're part of your video content as well as the other metadata associated with your video, such as the Tag and Description fields. If you work for Acme Electric and you're marketing the new Z500 convection oven, your keywords will include *Acme Electric, Z500,* and *convection oven.*

2. **Add a descriptive phrase to the title.**

   Your keywords alone may not be enough. Determine why your viewers would be searching for your product or your video. They may want installation instructions or product reviews, for example. Terms such as *how to install* and *product review* aid you in both search and views.

3. **Move branding keywords to the end of the title.**

   Viewers will search for your brands, but they need to see the descriptive information first.

4. **Move main keywords closer to the front of the title.**

   The right keywords really matter, so choose them wisely.

5. **If your video is part of a series, include an episode number at the end of the title.**

   Even if your videos are part of a playlist, your viewers may end up searching separately, so make it easy and logical for them to find another episode.

REMEMBER

Include title keywords in the tag and description metadata.

TIP

Keyword selection is art and science, but be sure to use keyword tools such as Google Keyword Planner, Google Trends, SEMrush, Ahrefs, and others. Don't just pick randomly because there is a lot of competition (and ad dollars) for keywords.

TIP

Before you even upload anything to YouTube, it's good practice to rename the video file itself to a title that accurately represents its content. YouTube keeps the original reference file title on the video no matter how many times you end up changing the title.

GOING LONG ON SHORTLINKS

Chances are, you've seen some rather interesting web names — like `bit.ly`, Rebrandly, TinyURL, and Short.io — as you've made your way around the web. Often, these web names are combined with what appears to be a random string of characters to produce something that looks like this: `http://bit.ly/1xUu7KB`. Like any Internet address, this link can be clicked to take you anywhere on the web, including YouTube. You can even click one of these funny-looking strings to get to the Watch page of a specific video.

What is this funky address? It's called a *shortlink,* and it replaces really long web addresses to preserve valuable space on sites such as Facebook and YouTube. How does this work? A shortlink has an associated target link. For example, in our link example, `http://bit.ly/1xUu7KB` actually points to `www.pixability.com`. When clicking a shortlink, users end up at the associated target. Shortlinks are formally known as shortened Uniform Resource Locators (URLs). *URL* is a fancy way of referring to a web address.

Many free services are available for link shortening. One of the most popular ones is `bit.ly`, and you can quickly sign up for it at `www.bit.ly`. In seconds, you'll be creating shortlinks to your heart's content.

But there's much more to shortlinks than meets the eye. Services such as `bit.ly` track clicks so you can see which shortlinks are the most popular. You can even have different shortlinks point to the same target address so you can test which tweets work better or which web pages may be most interesting.

The top YouTube channel managers use link shorteners extensively in YouTube descriptions, channel descriptions, and social media.

Writing apt descriptions

You should make good use of the 5,000-character field that YouTube provides for describing your video. In fact, YouTube recommends at least 200 words, but don't write a novella: include timelines of distinct segments in the video, affiliate links, and more. And break it up so your users can do a quick scan, making the description far more valuable. This is a great place to add details about not only your video but also your channel, along with links to other videos, subscriptions, other channels, and websites. In other words, it's a goldmine for both metadata and user guidance. (Figure 7-3 demonstrates what we mean.) The viewers who care about your video will read the description, so make it worth their while.

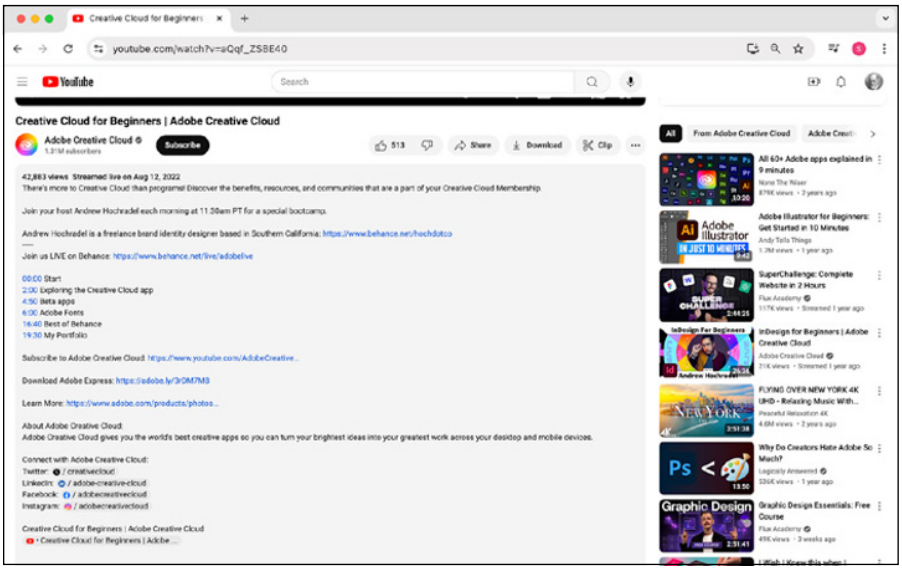

FIGURE 7-3: A well-constructed Video Description field.

The video description should

- **Explain** in greater detail what your video and your channel are about.
- **Help** the viewer by providing a timeline or chapters so they quickly find what they need rather than scrolling back and forth with the video scrubber.
- **Extend** the viewer's experience by providing additional detail around what is shown in the video. For example, if you have a video on cooking, the Video Description field is a great place to include a copy of the recipe. Even better? Let viewers know what things you're using in the video and provide links where they can buy them.
- **Trigger** the viewer to do something. That might include watching another video, making a purchase, supporting your cause, and more.
- **Entice** people to view. The first couple of lines of the description show up in search results, so you have to write compelling — and relevant — content so the user somehow takes the next step of clicking and viewing. That's also true on the Watch page, where the first couple of sentences appear under the video, compelling the viewer (you hope!) to watch.
- **Aid** in discovery. A great description should not include hundreds of keywords. Focus instead on two to five that help with search. Be sure to use ones that are relevant to the video.

REMEMBER

The Video Description field isn't the place for a transcript of your video. (There's a separate place for transcripts.) Be clear and concise, but make it interesting enough that people will want to read it.

Always consider what information is visible in search results by being well aware of which devices your audience is using to search. The first few lines of the description show up on a desktop search, whereas no description data is currently exposed in a mobile device search.

REMEMBER

Two older terms from marketing and advertising are still quite relevant to today's YouTube Video Description field: *above the fold* and *below the fold.* When people used to receive folded letters or advertisements, they often first looked at the top, which was "above the fold." If the content was compelling, they'd read the rest of it "below the fold." When viewers watch your video, they also see the first part of its description. If the description is compelling, they click the . . . more link to see what's below the fold. Make what's above the fold in the video description count.

The Video Description field should contain enough shortlinks to answer any questions your viewers might have about your video, your channel, and your business. The About page of your channel should contain links that complement your channel. It's okay to repeat some of these links in the video description as well. The shortlinks in the description field can point to

- Your channel
- Other videos
- Collaborators
- Gear you use
- Social media sites such as Facebook, X, Threads, LinkedIn, Pinterest, or Instagram
- A website
- A landing page

TIP

Include only one link in the first part of the description if you want viewers to ultimately end up somewhere else. Include all relevant social links or product page links in the second or lower paragraphs of the description.

TIP

Don't create a fully customized Video Description field for each video. Put together a consistent framework or template that includes some repeatable information, such as subscription information, social media links, programming schedule, and contact information. Customize only the data in your framework that relates to the video itself. Keep everything else consistent. Your audience will appreciate the consistent layout of your Video Description field as well.

WARNING

Everyone hates email *spam* — unsolicited advertisements filled with overdone and repeated buzzwords. If the description sounds at all "spammy," you'll provoke a negative reaction. Instead, try to be informative by using a lot of descriptive words and appropriate shortlinks.

Creating helpful tags

Tags are special descriptive keywords or short phrases that indicate what your video is about. They are used by search engines to help potential viewers discover your video. Tags also play an important role in helping YouTube make related video recommendations. (Your Video Description field also has keywords, but tags are used by YouTube to help categorize your video.)

YouTube imposes a limit of 500 characters for the entire Tag field. A tag can contain one or more words, but each individual tag cannot be more than 30 characters long.

TIP

Without wading too deeply into the math, you may end up with room for 10 to 30 tags. Use as many *relevant* tags as you can, but don't overdo it. Two to five may be just fine. In the early days of YouTube, tags had a more prominent role, but some creators started to overload their video with lots of irrelevant tags, known as "tag stuffing."

WARNING

Avoid tag stuffing at all costs. Otherwise, YouTube will penalize you. Don't use tons of irrelevant keywords to attract viewers and improve your search rankings. This will actually hurt your search rankings as YouTube will think it's spam. Plus, viewers may overlook your video if they can't find it.

What's the best approach to creating tags?

- **Think broadly.** Everyone searches differently — some use broad terms like *oven,* whereas others use *Acme Electric Z500 convection oven.* Use both.
- **Choose synonyms.** Though you may use *oven* only in the description and video, it's okay to use the word *stove* in your tags.
- **Add an action tag.** Sure, people may search for video about the *Acme Electric Z500 convection oven.* Think about terms that are relevant, such as *product review, how to install,* and *how to clean.* Pick one around the video content.
- **Combine and break up keywords.** Language and people are imprecise, so take that into account and use both keywords, as in *cook top* and *cooktop.*

Tags can be modified. Just be sure that they reflect the essence of the content.

Adding custom thumbnails

Thumbnails are visual snapshots of your video, similar to a poster for a movie. They have a tremendous impact on a video's view rate, so choose a good one. Thumbnails by default are chosen by YouTube — three optional frames from the beginning, middle, and end of your video. You can, however, create a custom thumbnail for each video using Photoshop or any other photo editing program. (See Figure 7-4 for some examples.)

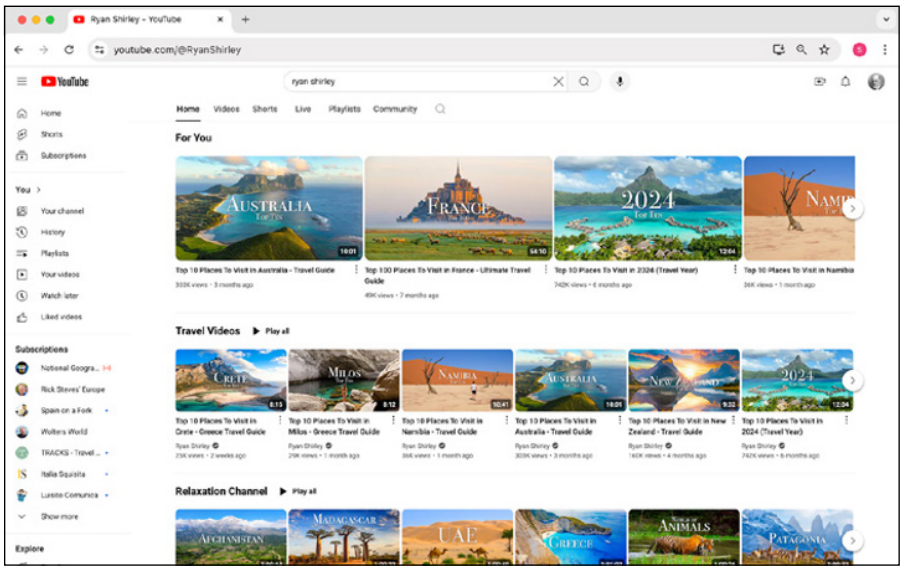

FIGURE 7-4: Effective video thumbnails.

If you decide to create custom thumbnails, choose a thumbnail that's illustrative of the content in the video. Thumbnails show up in the following areas:

- Channel page
- Watch page
- Playlists
- Recommended videos
- Channel guide
- Subscriber feed
- YouTube search
- Web search

- Mobile display
- Mobile search

Keep the following key considerations in mind when deciding on a custom thumbnail:

- **Incorporate boldness:** You're competing for viewers, so you need to stand out among the many other thumbnails across YouTube and the web. Color contrast, image quality, and visual layout matter.
- **Add personification:** Show the close-up view of faces, if possible. Viewers click on faces more than anything else.
- **Strive for accuracy:** The thumbnail has to relate to the content of the video. Don't use the thumbnail as a way to trick viewers into checking out your video.
- **Meet the technical specifications:** The image must be 1280x720 pixels and no larger than 2MB.
- **Add branding:** Viewers may not look at your thumbnail for more than a few seconds; adding branding is a great way to quickly let people know who you are. Plus, consistently branding your videos creates a cohesive look across your channel.
- **Add a bit of text:** But not too much, and make it relevant to the content. Keep in mind thumbnails are usually shown quite small, so make sure the text is legible on all screen sizes.
- **Create a template:** As you create more videos, you'll want your thumbnails to have a similar layout, even though the images and text will be different. This consistency makes your brand stronger and more memorable.

Uploading Your Video

There's always a bit of excitement when you upload one or more videos to YouTube. The feeling is similar to what happens when you see the proverbial light at the end of the tunnel.

REMEMBER

Uploading isn't the final step in getting your videos available for viewing by your growing fan base. You still need to *publish* an uploaded video in order to make it live.

Between uploading and publishing, you have several steps to consider. YouTube rewards you with higher search rankings and supplementary video recommendations based first and foremost on your channel and on individual video watch

times. In addition, YouTube looks at characteristics like viewer engagement and video sharing rates. Your job in the planning process is to identify and coordinate each component so that you're in a position to keep your channel active.

Picking the source

Before you upload, your videos have to live somewhere. They might be on your desktop computer, laptop, game console, tablet, or smartphone. What's great about having so many choices for uploading is that you can capture and upload content to your channel anytime and anywhere. It's that easy!

TIP

Sign in using the same YouTube account from all your different computers, consoles, and mobile devices so that all your videos and channel settings stay synchronized.

REMEMBER

The web browser interface to YouTube on your laptop or desktop has the most complete set of YouTube capabilities for uploading, optimizing, annotating, and publishing. For iOS and Android devices, you can run applications such as YouTube and YT Studio to upload videos and manage your channel. Though this application is quite powerful and has most of the features of the computer-based versions, we focus here on the browser-based versions.

Going public about YouTube privacy

New YouTube channel managers and creators often ask, "How do I control who can see my videos?" This is controlled by YouTube's privacy settings, which can be found under YouTube Studio — click the Content section on the far left to display your options in the Visibility column. You need to know and understand the four types of privacy settings in YouTube:

REMEMBER

- **Public:** This is the default setting in YouTube — everyone can view your video. Videos set to Public can also show up in all searches.

  After you make a video public, you've officially *published* it. It shows up in your subscribers' feeds. Though you can readily change the privacy settings on your content, be sensitive to how your audience is using and sharing it, because changing settings may suddenly make your content unavailable to them with no warning.

- **Private:** This setting, the most restrictive one, prevents anyone but you from watching the video without your explicit permission. Private videos cannot be searched, are not invisible on your YouTube channel, and can't be viewed by someone even if they have the video URL. This is ideal if you want to share your video with very specific viewers or even just yourself.

TIP

If you have copyright concerns, use private content first as a way to have YouTube analyze your video for any issues. If all is clear, you can then set it to either Unlisted or Public.

- **Unlisted:** Unlisted videos don't show up on your channel or YouTube search for viewers. However, anyone with the unlisted video URL can watch the video and share it freely anywhere on the web, including websites like Facebook, X, and other social sites. Unlisted videos can be included in playlists as well.

TIP

Use unlisted content as a way to share special or exclusive content with select fans or as part of a limited-time promotion or sale.

- **Scheduled:** This special setting automatically sets the video to Private and then changes it to Public on the date and time you specify.

TIP

Use scheduled privacy settings for channel programming consistency to ensure that videos are available at a standard date and time, regardless of whether you have access to your YouTube channel.

Your privacy settings also signal YouTube to begin its magic. When you publish a video, YouTube starts assessing your video by using its algorithms to determine what your video is about, how good it is, and where it should fall in search results. The best practice is to consistently publish your videos around the same time so your viewers know when to expect them. Publish the video so that it attracts immediate views; this indicates to YouTube that this video is indeed hot stuff and that it may be a good candidate for YouTube search and recommendations.

REMEMBER

Playlists have privacy settings, too. One of your options during the final stages of the upload process is to put your video content into a playlist. Chapter 3 covers playlists and their importance on your channel.

Don't underestimate the power of YouTube playlists. They not only show up in search results but can also be customized to greatly enhance the viewing experience.

Uploading to YouTube

You should have no problem finding the Upload button on YouTube — it's on every page! You'll find it in the top-right corner, to the left of the 3-by-3-square YouTube Apps icon in the top right of the window (whether you're logged in or out of your account). It's shaped like a small video camera with a plus sign in the middle. To upload your video content, follow these steps:

1. **Sign in to your YouTube or YouTube Studio account.**
2. **Click the Create button on the top-right next to the channel icon. If you're on a mobile device, simply look for the circle with the + sign.**

Doing so brings up a dropdown menu with options named Upload Video, Go Live, and — if enabled — Create Post. (If you're doing this from the YouTube Studio page, you may, depending on your YouTube Channel feature eligibility, see New Playlist and New Podcast as well.) Choose Upload Video, which takes you to the Upload Videos window, shown in Figure 7-5.

3. **Use one of the following two methods to select the video file you want to use:**

   - **Select files:** Click the big, gray up-arrow button or the smaller, black Select Files button. Then use the dialog box to navigate to — and then select — the file you want to upload.
   - **Drag-and-drop video files:** This one's as simple as it sounds: Just drag a video file to the Upload window and drop it when the drag-and-drop video file's overlay turns green.

4. **If your method requires it, click OK to upload.**

   Your files are on their way to YouTube.

5. **Get ready to enter your metadata.**

   With your videos selected and the upload under way, you're presented with a new Details page (shown in Figure 7-6) that shows important information about the video. (We save adding the metadata stuff to the Details page — title, tags, descriptions, and video thumbnails — for the next section.)

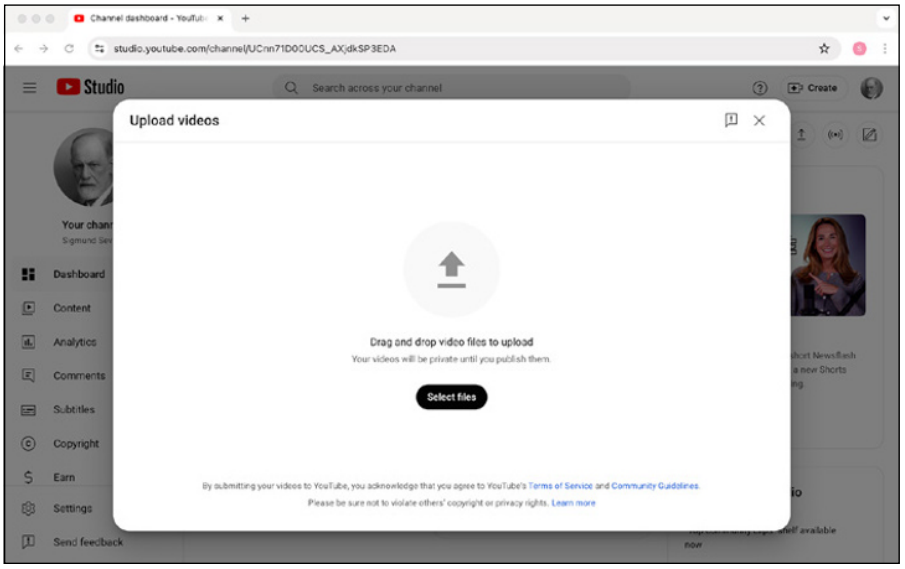

FIGURE 7-5: The YouTube Upload Videos window.

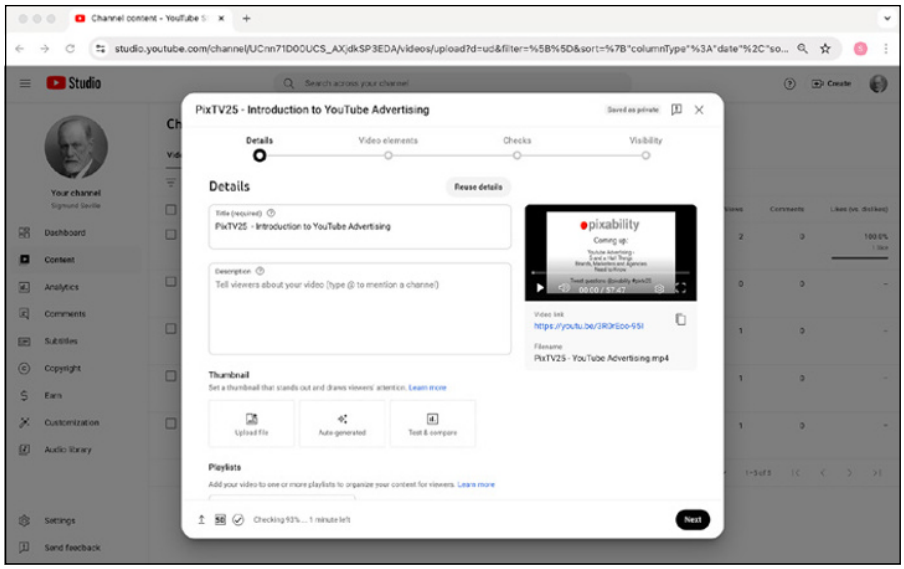

FIGURE 7-6: Entering metadata via the Details page.

REMEMBER

The Details page that you see during the upload process is the same one displayed when selecting the details of a video from the Videos tab in the Channel Content view of YouTube Studio. This allows you to go back later and modify the video settings, including such tasks as changing the video description, tags, and thumbnail.

TIP

YouTube easily handles most video encoding types. If YouTube is having any problems with your file, check out `https://support.google.com/youtube` for more information.

USING YOUTUBE TO TRANSFORM A PASSION INTO A LIFESTYLE AND BUSINESS

Dr. Matthew Horkey had a successful business practice but realized that as fulfilling as his work was, something was missing, so he decided to take a sabbatical and figure out what that was. He set out on a worldwide trek, venturing to remote places like Armenia and Georgia. While there, he discovered unique and excellent wines the world knew nothing about. In 2015, inspired by Gary Vaynerchuk's `youtube.com/@WineLibraryTV`, he started recording videos on his iPhone and created his YouTube channel `youtube.com/@drmatthewhorkey`. Today, Dr. Matthew Horkey's channel is one of the world's top YouTube wine channels. He is also now one of the most sought-after experts on wine, frequently traveling the globe, meeting with winemakers, educating consumers, and helping judge wine competitions. YouTube is his vehicle.

(continued)

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When Dr. Matthew Horkey started out, aside from capturing video on his now-primitive mobile phone, he had no video experience. "For the first five to six years," he modestly admits, "I really had no clue." That didn't stop him, and he knew there were things to learn, so he used YouTube to get the training he needed. In time, he started adding microphones and editing his videos with Apple's iMovie, and now he uses Final Cut Pro. He moved from his iPhone to a Nikon digital SLR camera and now records on a Sony mirrorless camera. His setup additionally includes two microphones and five lights. That's a long way from a guy with a mobile phone. And he admits, after all this time, he's still learning.

Today, he's utilizing both long-form horizontal video and shorts, often deriving ten to twelve shorts directly from his original videos. He also maintains an edited backlog of months of both video types, allowing him to retain his regular YouTube publishing schedule, no matter where in the world his full-time, creator/educator "day job" takes him. He does leverage other social channels, such as Instagram. He also spends a good deal of time testing thumbnails and working with Facebook, Instagram, TikTok, and X, but YouTube is the foundation for his ever-growing business. SEO and analytics also play an ongoing and vital part in his work, but he prescribes, "Don't get analysis paralysis. Look for things that matter, such as what people are searching for and where they're replaying segments or leaving the video." He adds, "Remember that in long-form and short-form video, you've got to make the beginning pop, so don't leave all the good stuff for the end."

Horkey is a YouTube success story, but it took time. He was (and remains) patient, diligent, and curious. He also admits, "YouTube can be a lonely profession." His antidote? He collaborated with other wine YouTubers, which he helped pioneer in the wine industry.

Regarding working with others, he said, "It seems weird because you're working with your competition, but you're really not. In fact, it's turned into a bunch of friends helping one another." As Horkey continues to teach and interact with an enthusiastic and ever-growing audience on YouTube, he says, "Being a YouTube creator is also about fostering personal development." He continues to prove it.

Entering information about your video

It doesn't matter whether your upload is a work in progress or a finished product; you can begin adding the metadata at any time, in a process known as *video optimization.* In the YouTube world, optimization involves dealing with four distinct areas:

- **Details:** This is the most important information because it contains all the important fields for video SEO, including title, description, and tags.
- **Monetization:** A creator who has elected to make money from ads being placed with their video can use this section to specify what types of advertising can be shown against the video. Chapter 13 covers this topic in more detail.
- **Video elements:** You can add engaging or interactive end screens and cards to encourage viewers to watch other videos or visit related sites and links. We cover these in greater detail a bit later in this chapter.
- **Visibility:** Here you can control who can see your videos. As explained in a previous section, you can choose between four options: Public, Private, Unlisted, and Scheduled.

Have at it and edit the details. (Refer to Figure 7-6 to see the layout of the Details page.) Although it isn't rocket science, you still want to make sure to cross your *t*'s and dot your *i*'s. Follow these steps to edit your video's basic info:

1. **Make sure the Details page in the Upload window is selected.**

   The heading of the active section (refer to Figure 7-6) and the number preceding it are highlighted in black. If Details isn't selected, simply click on the name, and the section fields appear. If you haven't filled out the required fields, you aren't allowed to advance to the next sections.

2. **Using your newly acquired SEO knowledge, come up with an appropriate title for your video and enter it into the Title field.**

3. **Enter an SEO-friendly description of your video into the Description field.**

4. **Upload or choose a thumbnail.**

   Though you *can* choose one of the three autogenerated thumbnails, we highly recommend making a custom thumbnail designed to be as eye-catching as possible.

REMEMBER

   The thumbnail, which is your billboard, has a big influence on whether someone watches your video.

5. **(Optional) Add your uploaded video to one or more playlists.**

   You can also create a new playlist here. Simply select the playlist where you want the video included or create a new one. (You can select more than one playlist.)

6. **If the video has been made for children, specify that fact.**

   This field is required by YouTube to make sure the video is in compliance with COPPA — the Children's Online Privacy Protection Act. You can find the details about COPPA on the Federal Trade Commission website: `www.ftc.gov`.

7. **Add any age restrictions.**

   Don't overthink this. If you're a business, you really don't need to limit it to viewers over the age of 18. However, if you're dealing with lifestyle content, such as liquor reviews, you may want to consider it.

8. **Click the Show More button for a more detailed list of options.**

   YouTube has added a lot more information here since the last edition of this book. Expect it to keep growing on a regular basis.

9. **Indicate whether your video contains any sort of paid promotion.**

   If someone else has paid for you to mention their product or service, YouTube asks that you disclose it, to make sure you're in compliance with all advertising and law requirements. You can also add a message to inform your audience of the promotion, if you choose.

10. **Specify if some of the content is altered.**

    In the age of AI, it's much easier to produce synthetic content, which can be good or bad. Either way, YouTube needs to know about it. We cover the use of AI in Chapter 14.

11. **Click Featured Places if it matches the objective of your channel.**

    This capability is important for creators and brands that need to highlight destinations that appear in the description or in the transcript, which we cover shortly.

12. **Add SEO-appropriate tags in the Tags field.**

REMEMBER

    YouTube imposes a limit of 500 characters for the entire Tag field. A tag can contain one or more words, but no individual tag can be more than 30 characters long. Depending on how you divvy up your 500 characters, you can end up with between 10 and 30 tags. As discussed in the "Creating helpful tags" section, two to five may work well — don't use tags that have no relevance.

13. **Choose the video language, subtitles, and closed captioning.**

    Select a video language, caption certification (if it has aired on TV, federal regulations may require closed captions), title, and description language.

14. **Add the recording date and location.**

    Though not required, this can help your SEO, because viewers can search videos by their location.

15. **Specify the license type and distribution settings.**

    You can choose between the default Standard YouTube license (the stipulations of which are laid out in YouTube's terms of service) or Creative Commons - Attribution, which makes your content available for use by other creators.

Here's where you can permit the video to be embedded on other websites and determine whether your subscribers will receive a notification about the video's upload, both of which are on by default.

16. **Determine if you want to permit this video to be used to create Shorts.**

    If you allow remixing of your video into Shorts, creators can use your audio and video. Why do this? All remixed content maintains attribution back to you and your channel.

17. **Indicate in which category your video fits.**

    Specifying the category of your video can help viewers find it more easily.

18. **Finally, choose the comment and rating settings.**

    By default, all comments are allowed and are sorted by most popular first. You can make it so that some or all comments must be reviewed by you, or you can turn off comments altogether. Generally, viewers like to see comments in real time, and they take note if you require approval. You can also deactivate the viewers' ability to like or dislike the video, though doing so can hide how your audience feels, meaning you won't have access to important information about viewer engagement.

Entering monetization instructions

If you're part of the YouTube Partner Program, the Details page is followed by the Monetization page. To learn how to monetize your videos, visit Chapter 13. If you're not able to monetize, skip this section and go to the Video Elements page, covered later in this chapter.

The following steps show how you can set the monetization for your uploaded video:

1. **Click Next in the bottom-right corner of the Details page.**

   Doing so takes you to the Monetization page, as shown in Figure 7-7.

2. **Make sure Monetization is set to On.**

   If your account is able to monetize, this setting is on by default. If, for whatever reason, you want to turn it off, choose Off from the dropdown menu.

3. **Click Next in the bottom-right corner of the Monetization page.**

   Doing so takes you to the next Monetization page, as shown in Figure 7-8. This is a much more complicated topic, so we recommend you visit Chapter 13 for more details on ad formats. In the meantime, review any issues shown in this page. Note that *Checking* will appear as YouTube analyzes your video.

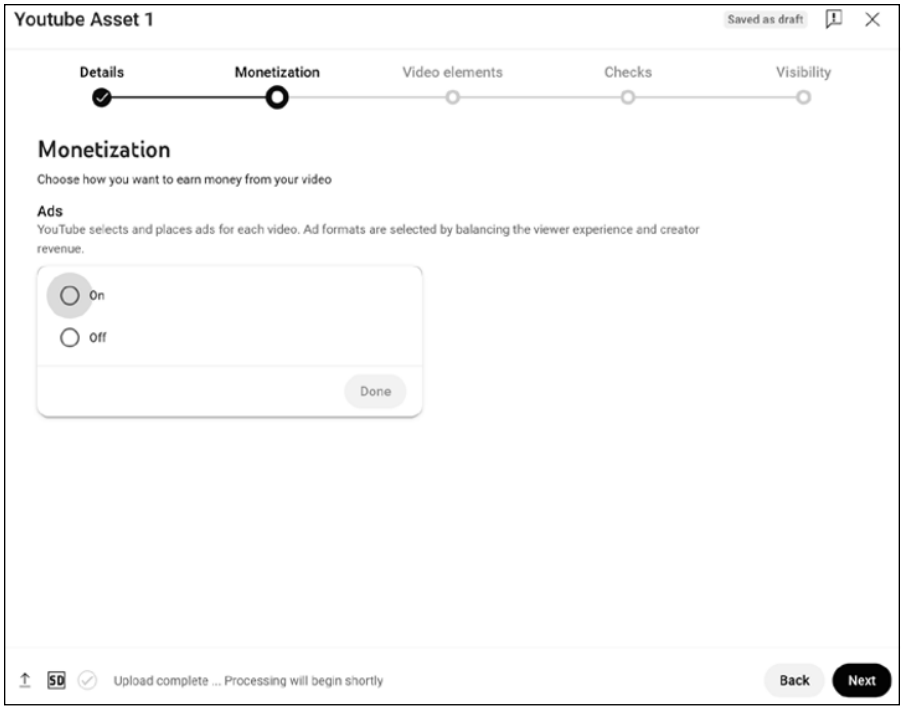

FIGURE 7-7: Turning on YouTube monetization page.

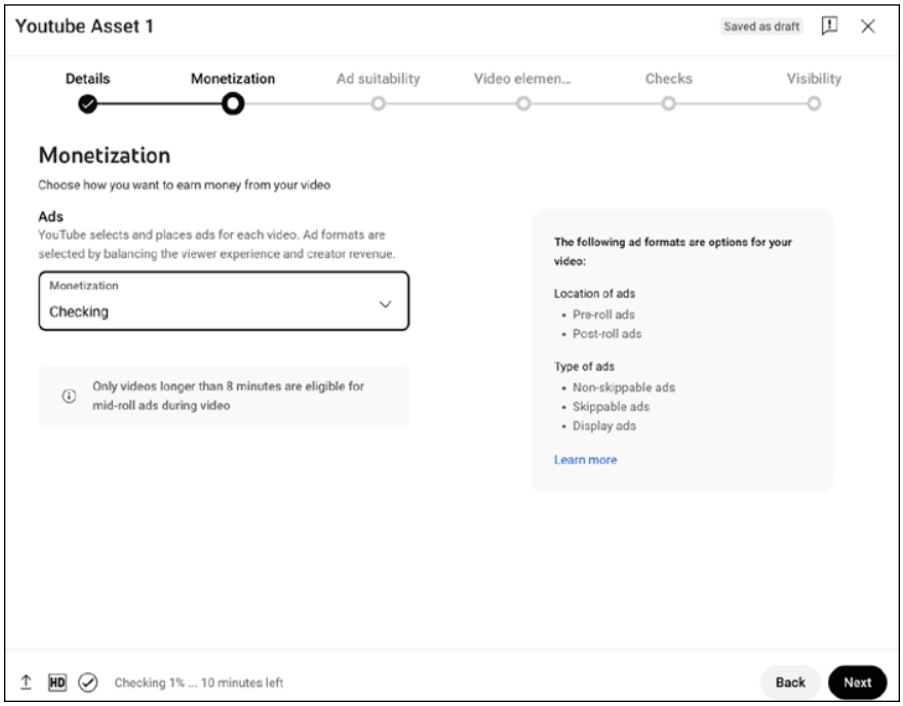

FIGURE 7-8: YouTube's Monetization page.

4. **Click Next in the bottom-right corner of the Monetization page again.**

   Doing so takes you to the Ad Suitability page, as shown in Figure 7-9. YouTube relies on brand advertising for a great deal of their revenue, so advertisers do not want their ads placed against content that's either offensive to their audience or not aligned with their brand. Scroll through this page and identify any elements that are contained in your content.

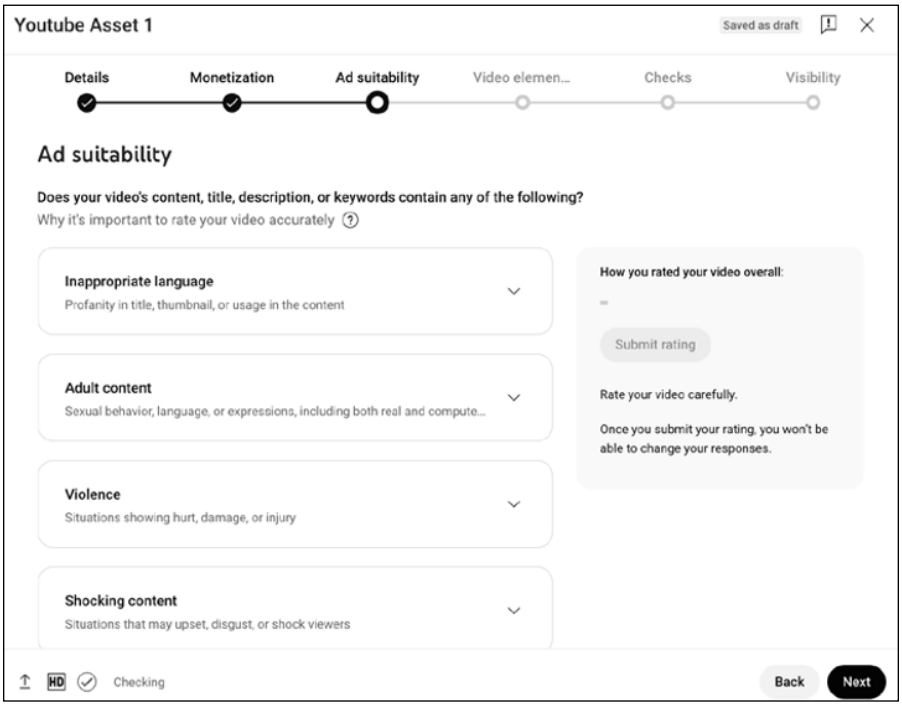

FIGURE 7-9: YouTube's Ad Suitability page.

WARNING

If your videos are getting flagged because you haven't categorized the content, title, description, or keywords properly, you may end up losing monetization for your entire channel.

Setting up video elements

You've probably figured out by now that YouTube has lots of bells and whistles. Don't worry: You're halfway there! This section allows you to customize your video's subtitles, end screens, and cards, but you can easily skip over it if you're just starting out.

To edit the video elements, do the following:

1. **Click Next in the bottom-right corner of the Details or Ad Suitability page.**

   If you're part of the YouTube Partner Program, you'll click Next in the bottom-right corner of the Monetization page. Doing so takes you to the Video Elements page, as shown in Figure 7-10.

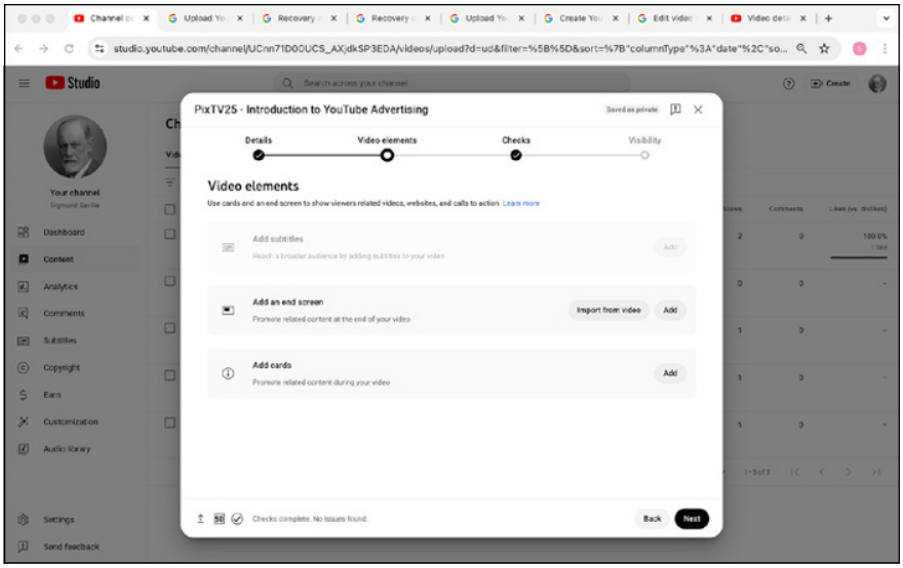

FIGURE 7-10: The Video Elements page.

2. **(Optional) Add subtitles.**

   You can set up default subtitles on the left side of YouTube Studio. This setting allows you to change it for a particular video. This is a complicated topic, so we recommend you visit `support.google.com/youtube` for more details.

3. **Create an end screen by clicking the associated Add button to the right.**

   Doing so opens a new window for creating and editing end screens, as shown in Figure 7-11. *End screens* are terrific for calls-to-action at the end of your video. They could include the next video to watch, a link to subscribe, or an associated playlist. End screens can contain any combination (up to four total elements) of the following: videos, playlists, a subscribe card for your channel, links to other channels, or external links. YouTube offers six template card combinations or, by clicking the + Element button, you can customize the layout yourself. A highlighted box over the player shows you where the

elements appear and can be adjusted by clicking-and-dragging. You can alter the timing of each element by manually entering new times (shown to the right of the element type) or by clicking-and-dragging the length of the element in the timeline below. To delete an element, click the Trash icon. Once you're happy with the orientation, you can preview it by clicking Play on the player, or you can simply click Save. This takes you back to the Video Elements page.

End screens are a great way to boost your viewers' engagement and retention at the end of your videos while also allowing you to direct them to more of your content and brand.

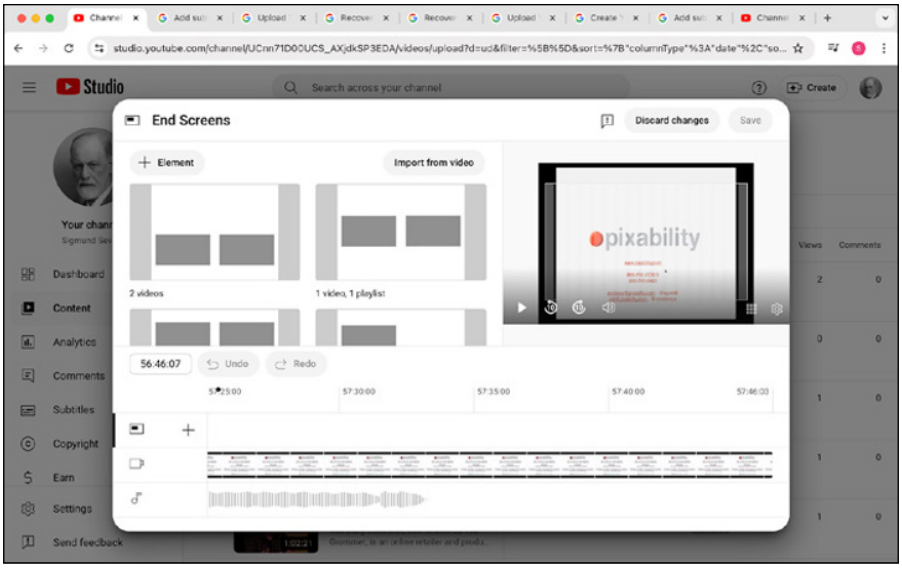

FIGURE 7-11: The End Screens editor.

REMEMBER

Videos must be at least 25 seconds long to accommodate end screens, which can be from 5 to 20 seconds long. If your content is marked as being made for children, you cannot add an end screen. End screens appear over the actual video, so if you're using them, it's best practice to edit in a little extra blank space at the end of your video so that important information isn't obscured. When adding end screens to your video, at least one of the elements must be a video or a playlist.

4. **Create cards by clicking the associated Add button to the right.**

You're presented with the Cards editor, as shown in Figure 7-12. YouTube Cards are interactive overlay elements of a video that give your viewers a call to action, such as jumping to a new video or clicking to a new web destination. At first glance, they can seem similar to an end screen, but they can pop up at any point

in a video. Clicking this button reveals four options: Video, Playlist, Channel, and Link. Clicking Create next to any of the options allows you to customize the content of each card. When you're ready, click Create Card. You can alter the placement of each card within your video by dragging it along the timeline below. To preview, simply click Play in the player window. If you want to remove a card, click the Pencil icon and then click the Trash icon. When you're finished, click the Return to YouTube Studio button in the top-right corner.

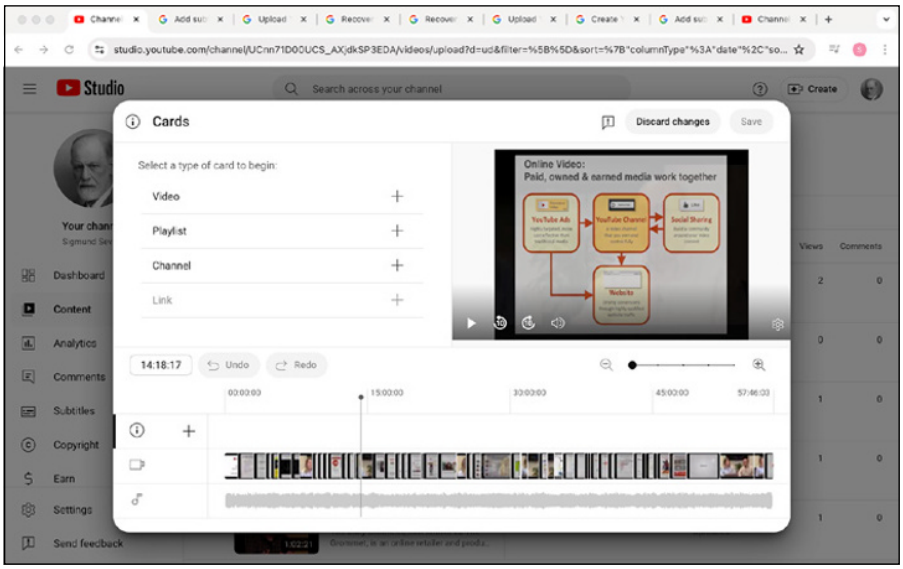

FIGURE 7-12: The Cards editor.

Cards help your audience interact with you and your videos and can be a valuable way to direct them to more of your videos or get meaningful feedback.

REMEMBER

You can have up to five cards in a video. Space out the cards in your video; that way, your audience has time to process them and interact. And make sure they're relevant to what's happening at that point in the video. The Card icon disappears after several seconds, allowing your viewers to more easily notice when the next one pops up. The Link Card option becomes available once you have met the minimum requirements to unlock that option in the YouTube Partner Program. This allows you to direct viewers to a website, for example.

Maddie Lymburner creates fitness videos on her YouTube Channel MadFit for her nearly ten million subscribers. She uses a combination of end screens and cards (see Figure 7-13) to enhance the interactive experience of her channel. She also has a separate app for her audience, shown by hovering over the card in the middle (see Figure 7-14) and clicking through, which brings users to her app store, as shown in Figure 7-15.

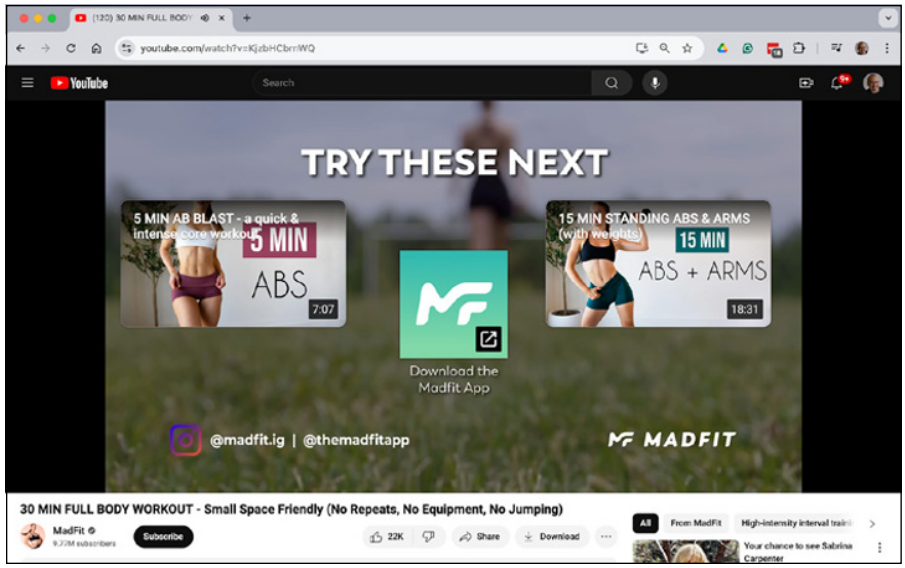

FIGURE 7-13: Example end screen and card.

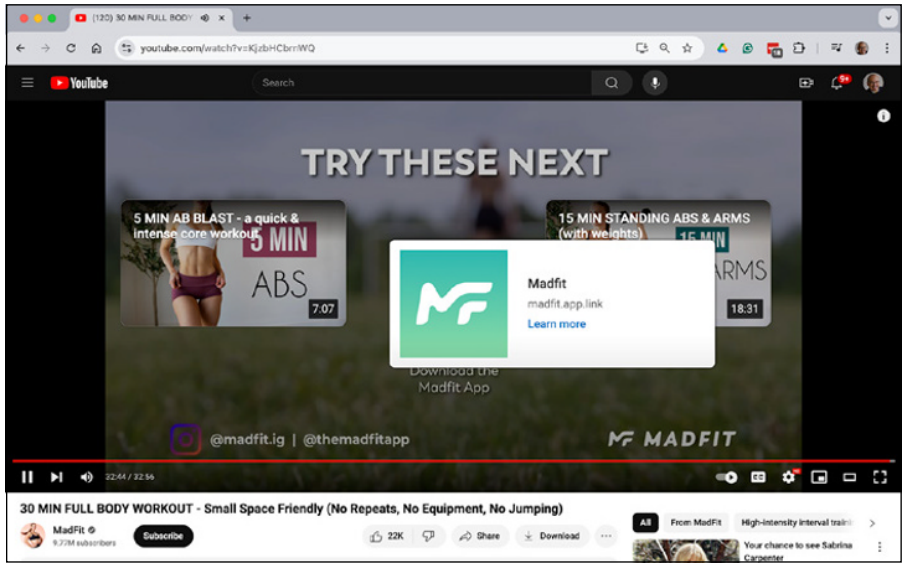

FIGURE 7-14: A Hover Over card.

Conducting copyright checks

You're almost there. Now YouTube has to check for any copyright issues, and, if you're in the YouTube Partner Program, for ad suitability. This step allows you to address any issues before you publish. It's better to fix problems now rather than deal with more complex issues, including copyright strikes, later.

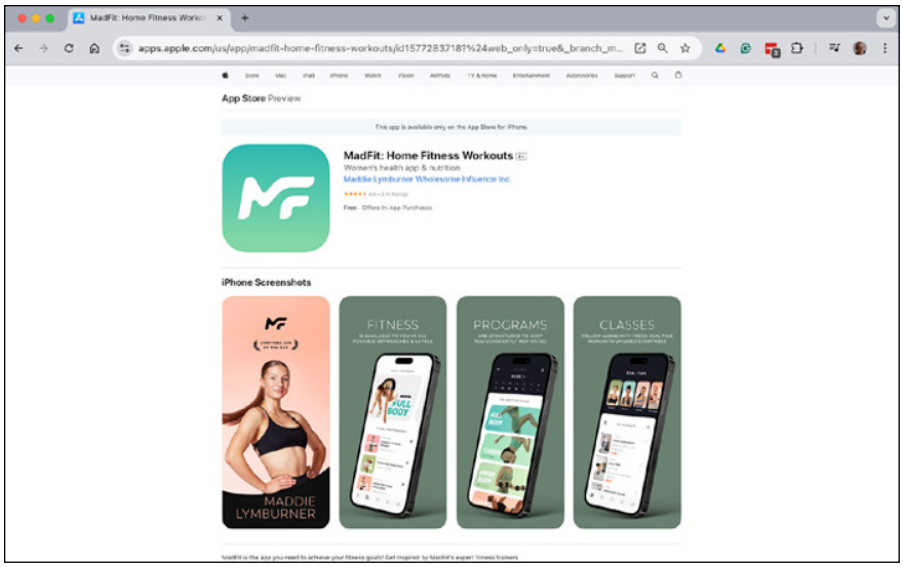

FIGURE 7-15: Example click-through card destination link.

To start the check, click Next in the bottom-right corner of the Video Elements page. The Checks page is shown in Figure 7-16. If all is good, you'll see a green checkmark off to the right. If there are problems, they will be listed on the page, and you can click each one and pick the appropriate fix.

Now that you understand end screens and cards and you've checked for copyright issues, you're ready for the final step: publishing your video.

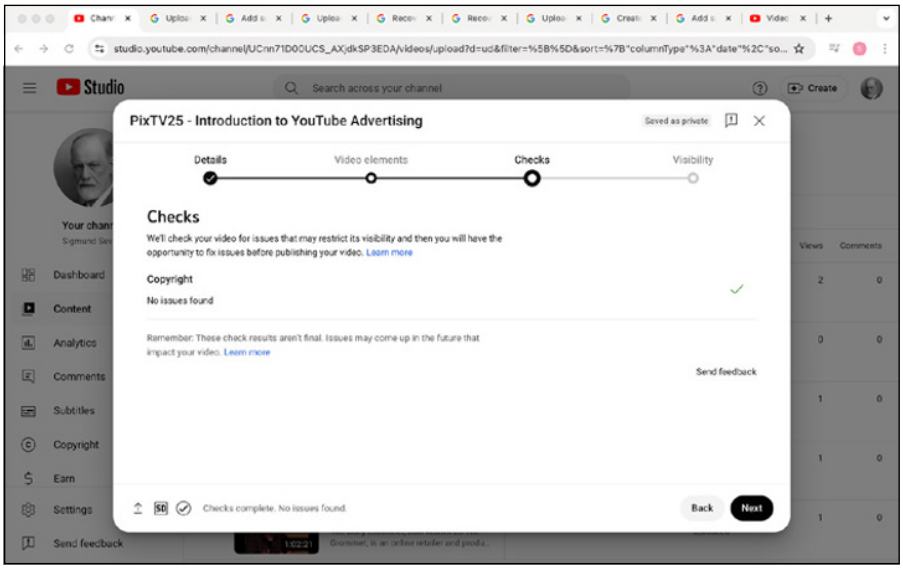

FIGURE 7-16: The YouTube copyright Checks page.

Publishing and Unpublishing Videos

The fourth and final tab, Visibility, is what stands between your video and your audience. As a YouTube channel manager or content creator, your work may well be done when you've uploaded your videos and set the metadata. Publishing is all about configuring the privacy settings that are most appropriate for your users and clicking Save during the upload process or on the YouTube Studio Content tab. For most channel managers, that means setting the video to Public at a specified time.

Publishing or scheduling your video

To begin the publishing process, click Next in the bottom-right corner of the Checks page (refer to Figure 7-16). The Visibility page appears, as shown in Figure 7-17. We walk through each of the choices, but remember that each of these can be changed at a later time. Your selections include:

- **Save or Publish:** This option is selected by default. Depending on how you choose to publicize your video, the black button in the bottom-right corner says Save, Publish, or Schedule. Under Save or Publish, you find these three options:
  - *Public:* Post your video right then and there once you click the black Publish button in the bottom-right corner. You can also make it a premiere by ticking the corresponding box below. An *Instant Premiere* allows you to watch your video as it is released alongside your viewers, including a live chat where you can interact.
  - *Unlisted:* This is the default visibility for your video unless you choose otherwise. YouTube recommends that creators leave this setting alone so that any issues with the video — monetization or otherwise — are caught by YouTube before the video has been sent to your subscribers. Once it passes the filter, you can then publish it for your viewers to see. You can also leave it as unlisted if you only want people with the link to be able to view it. The black button in the bottom-right corner says Save.
  - *Private:* Restrict the video's visibility to only you and anyone you choose to share it with.

    The black button in the bottom-right corner of the page says Save.

- **Schedule:** This option allows you to set an exact date and time for when you want the video to go live, which is handy if you're trying to post with a specific cadence. You can also schedule it to be a *premiere,* which functions as previously mentioned but also includes a public watch page that counts down to when the video goes live. The black button in the bottom-right corner now says Schedule.

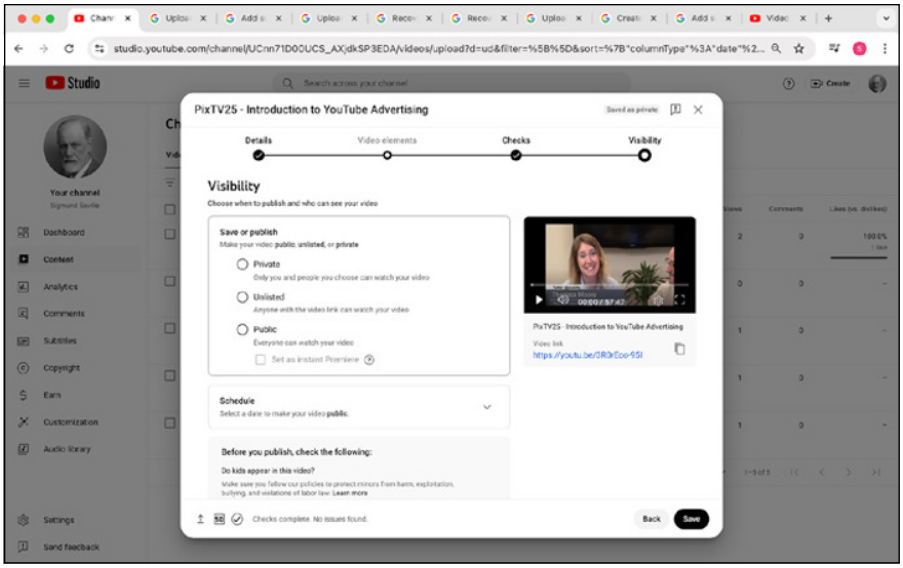

FIGURE 7-17: The Visibility page.

REMEMBER

After you've uploaded a video, you can't simply replace it with another one and use the same video URL. If you need to remove a video from general viewing, you have two choices:

- **Unpublish it.** Set it to Private.
- **Delete the video.** Remove it from YouTube permanently.

You can delete only videos that you own. To delete a video, follow these steps:

1. **Log in to your YouTube Studio account.**
2. **On your YouTube Studio, click the Content icon to bring up your videos.**

   You can also bypass these steps by going to `www.youtube.com/my_videos`.

TIP

3. **To delete one video, click the box to the left of the thumbnail of the video and choose Delete Forever from the More Actions dropdown menu that appears.**

   You're presented with a confirmation dialog box.

4. **Select I Understand and then click Delete Forever if you want to delete, or click Cancel if you've made a mistake or changed your mind.**

5. **To delete multiple videos, select one or more check boxes to the left of the thumbnails of the videos you want to remove, and then click Delete Forever beneath the More Actions dropdown menu that appears.**

   You're presented (again) with a confirmation dialog box.

6. **Check I Understand and then click Delete Forever if you want to delete, or click Cancel if you've made a mistake or changed your mind.**

   Figure 7-18 shows multiple videos selected for deletion.

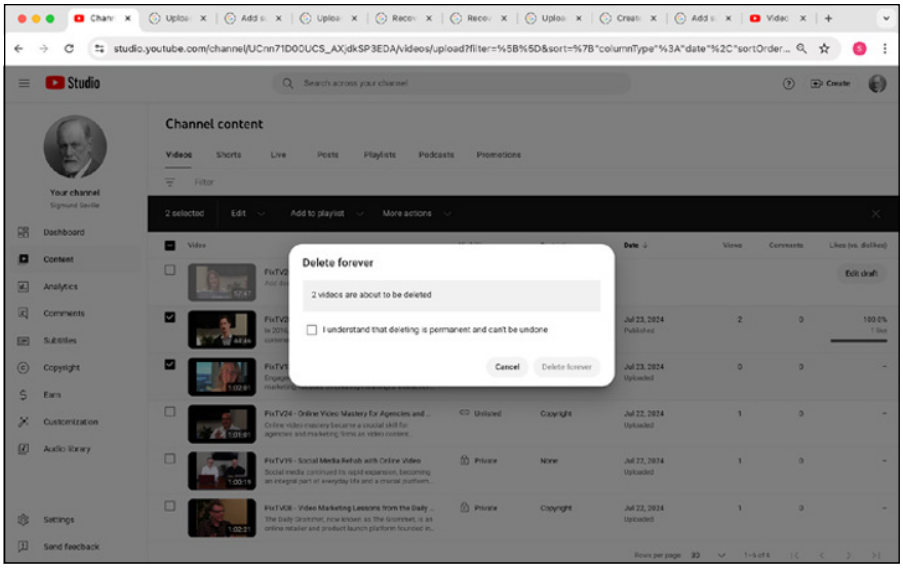

FIGURE 7-18: Deleting multiple videos from YouTube Video Manager.

Setting upload defaults

After you hit your groove and are uploading lots of content, you may tire of having to enter the same information over and over again into the various upload screens. Fortunately, YouTube allows you to set default values on the most common Basic Info, Advanced Settings, and Monetization (this last one for YouTube Partners) options.

Simply choose Settings from the YouTube Studio menu on the left side of the screen and choose the Upload Defaults option. Figure 7-19 shows the kinds of things you can set as defaults using this option. These are handy if you format titles and descriptions similarly from video to video. You can also click Advanced Settings for more upload features such as Category, Chapter Creation, Comments, and more.

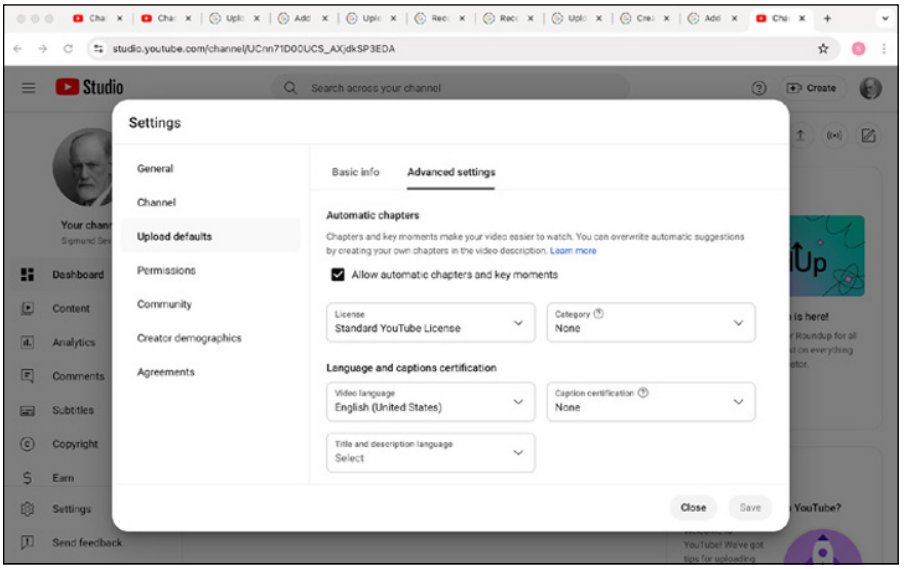

FIGURE 7-19: The YouTube Upload Defaults configuration.

REMEMBER

Defaults are simply preconfigured values. You can change values either during the upload process or by altering the settings in the Video Details page.

3 Growing, Knowing, and Engaging Your Audience

IN THIS PART . . .

Learning what it takes to expand your audience

Planning your content for better channel results

Working with analytics tools to get a better sense of your audience

Understanding the data you can gather from your customers

IN THIS CHAPTER

- Developing an engaged community of channel subscribers and fans
- Recognizing your fans and figuring out how best to communicate with them
- Making comments work effectively for your channel and your audience
- Driving audience engagement through live events and longer watch sessions

Chapter 8
Building Your Audience

There's obviously more to being an excellent channel manager than simply uploading a few videos and arranging a playlist or two. To truly excel as a channel manager, you have to realize that the core of your YouTube channel activities centers on your audience and on recognizing and responding to their needs. Your audience, whether it consists of 1,000 people or 10 million people, is coming to your channel and watching your videos for a reason, whether it's education, entertainment, product information, or what-have-you. Building an audience is about catering to the requirements of your viewers.

In the "good old days" of television, content was broadcast to a mass of viewers who were, for the most part, anonymous. It was never truly clear how many people were watching, so companies such as Nielsen provided estimates. The only feedback the audience delivered was either watching or not watching. As important as it was to retain regular viewers, the television networks knew they had to grow the addressable audience as well. They did this by putting together good shows and advertising lots of products. There wasn't much else for the audience to do than show up and watch shows when the networks aired them.

Fast-forward to Generation YouTube, where a completely different set of audience expectations affect not just viewing patterns but also how viewers expect to interact with the stars of the show. In this sense, the YouTube world is a two-way

street, where the audience expects a back-and-forth exchange with the content providers. Audiences want an experience on their terms.

Over the last ten years, the relationship with the audience has evolved outside of just YouTube. The digital world is not just YouTube and the Comments section anymore — there are several platforms that audiences engage with on a daily basis. You need to engage with your audience across YouTube, TikTok, Instagram, and more. Your interactions and relationships may even be different platform to platform.

As a YouTube channel manager, you need to keep that engagement going. If you manage a YouTube celebrity, consider yourself the agent. Got a brand or a business channel? You need to put on your social-media-and-press-relations hat. Either way, you need to treat your audience with the same care and attention as you do your own content.

Developing a Community

Your audience consists of the people who watch your videos. As you acquire bigger audiences, YouTube ranks your channel and content higher, greatly aiding *discoverability* — the process whereby potential viewers are led to view your content. It's that simple, and it's why audience development is vital to your channel strategy. You want that newly acquired audience to visit your channel and experience more of your great content. It's a good pattern to establish.

Deciphering audience evolution

Unless you're already a celebrity, you probably won't acquire an audience overnight. That's okay. You need to understand that it may take years to build the right audience. Also remember that your channel may be evolving as well. Where you start on YouTube may not be where you end up. Nonetheless, consider the evolution of your audience and how they engage with your content. That process should (you hope) play out with these characteristics:

- **Interest:** Viewers are interested in something, whether it's Bruno Mars, monster trucks, Indian cooking, radiant floor heating installation, or so much more. They search and come to YouTube to find out more about the topics they're interested in.
- **Curiosity:** Impressed by watching one of your videos, your viewers then visit your channel to look for more of your content. A nicely designed channel and well-organized playlists enhance their experience.

- **Connection:** Liking their experience with you and your channel, they now want to stay current and be informed of updates. They choose to subscribe.
- **Engagement:** Your audience wants even more, so they begin to click that handy Like button on some of your videos and start offering comments. They may engage with each other using the Comments section of your channel. Oftentimes, they will even tell you the content they want to see next in your Comments section.
- **Promotion:** The audience shares your content via Facebook, X (Formerly Twitter), TikTok, and other social media channels with others who share similar interests — others who (hopefully) also become part of your audience.
- **Collaboration:** In addition to giving you feedback, your most passionate fans may even work with you on content.

Determining what you want your audience to do

Though your final goal may be to become a YouTube celebrity and have your audience request autographed pictures of you, you have some other homework to do before the audience is eating out of your hand. Your audience requirements come down to two simple things you want them to do:

- **Watch:** You know the importance of watch time on discoverability. Your audience needs to view your content regularly — and you need to feed them good content regularly.
- **Engage:** Having viewers watching content is great, but having them actually do something is the frosting on the cake. Engagement is a broad topic that you can read about at length in this chapter. It includes actions such as liking, commenting, messaging, sharing, and clicking.

  Engagement is a two-way street. You need to engage back as well. Rick Shiels (`www.youtube.com/@RickShielsPGA`), for example, has built one of the top golf channels on YouTube. He stands out from the pack with quality content and by engaging with his audience. He didn't get where he is today without listening to his fans, and the proof is his engagement in the Comments sections of his videos by liking, responding to, and pinning quality comments (see Figure 8-1).

REMEMBER

REMEMBER

As you gain viewers, your watch time and engagement levels increase. That's why building an audience for your channel can't be left to chance. As you grow, you still want to engage your fans.

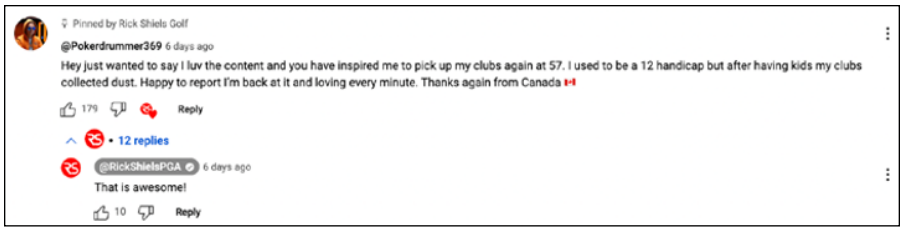

FIGURE 8-1: Rick Shiels comment engagement.

Appreciating the importance of community

Communities have developed around common interests for thousands of years. From medieval guilds to book groups to political movements, people have banded together into communities. As the Internet grew in both reach and popularity, virtual communities began to spring up. Suddenly, people could be part of large, diverse communities spread over continents and time zones.

By bringing the video component to the Internet picture, YouTube made these communities more engaged — and more real. You could actually see your peers. As a result, YouTube communities quickly showed that they could be an extremely important resource for creators as well as companies.

YouTube has made it possible for people to find very niche communities that they may not be able to find otherwise. Want to learn how to groom a dog? There is a channel for that (`www.youtube.com/@GirlWithTheDogs`). Want to watch a channel dedicated to house plants? There is a channel for that (`www.youtube.com/@CrazyPlantGuy`). If you have a niche interest, YouTube is the destination to learn more about it and engage with others with the same passions.

REMEMBER

Your community could do much to drive the audience growth of your YouTube channel, but for that to happen, you need to be a genuine and active member of the community.

Over time, many members of your community will take that extra step and subscribe to your channel. Subscribers are worth their weight in gold because they watch more and engage more. Clearly that's a good thing, but there's something else: The YouTube Partner Program (YPP) offers additional features to channels that have higher subscriber counts. As you acquire more subscribers, YouTube gives you more perks.

In the YouTube world, you also hear a lot about *fans*. Aren't all subscribers fans? Not exactly. Your fans are that subset of your subscribers who exhibit considerably higher levels of engagement. Take care of your subscribers, and take special care of your fans.

Determining your subscription source

If your channel has a large number of subscribers, YouTube provides interesting options for analyzing them in order to learn a bit more about them and (hopefully) communicate with them more effectively. These features are found in the Analytics section on the Audience tab within YouTube Studio.

TIP

Your subscribers might all be watching a specific type of content from your channel, so be sure to *listen* to what your audience wants to watch by reading and responding to their comments, and then analyze the content they're spending their time watching.

Here's how you can access some of the more helpful dashboards for subscriber analysis from YouTube Studio:

1. **From YouTube Studio's main page (`studio.youtube.com`), choose Analytics from the menu on the left.**
2. **Click the Audience tab at the top of the new screen that appears.**
3. **Click the gray See More button in the bottom-left corner of the main view of the Audience Report tab.**

   A whole set of new dashboards appears for your analysis.

This view of the channel reporting is crucial to understanding how your community is consuming your videos — where they find the content, who they are, how old the viewer is, what gender, where the viewer originates, and so much more. It is important to look at all of your viewer statistics and not just those of your loyal subscribers. There may be many untapped opportunities for you once you really know who your viewers are and where they are coming from.

It's important to achieve a good balance between creating content for subscribers and non-subscribers. Be sure to review your loyal subscribers when analyzing your channel statistics.

REMEMBER

Be sure to choose the date range you want to analyze. If this is your first time looking at this report, it might help to view the lifetime of your channel and then work your way up to the present month.

Understanding Subscribers and Their Value

YouTube allows viewers to connect more deeply with the channels they like by allowing them to become subscribers. To subscribe to a channel, all a viewer needs to do is go to a channel's homepage and click either the black Subscribe button or a link to the Subscribe button. Viewers can also subscribe from a Watch page, a subscriptions channel list, or when a channel shows up in a YouTube search.

Understand that your subscribers have both YouTube value — in the sense that a higher number of subscribers lets YouTube know that your channel and content are important — and in some cases, monetary value. If you make money from YouTube or are planning to, you look at the audience data and revenue source to determine what your subscribers are worth. You can read more about these topics in Chapter 13.

REMEMBER

Viewers must be logged in to subscribe to a channel. If they happen to click the Subscribe button when logged out, YouTube simply asks them to log in with their Google credentials.

If a viewer is logged in and visits a channel page that they have subscribed to or if they visit a video Watch page that's part of one of their subscribed channels, they see the gray Subscribed button, as shown in Figure 8-2 — not the Subscribe button, in other words. Note that once you click the Subscribe button, a menu appears listing the options that allow subscribers to control how they receive channel notifications.

Convincing viewers to subscribe

Channel managers have several options when it comes to providing viewers with the tools necessary to subscribe:

- **Button below the channel art:** On every page that has channel art (such as the homepage, the Videos page, the Playlists page, and the Shorts pages) you'll find the Subscribe button under the left side of the channel art. (Channel art is described in Chapter 3.)
- **Buttons on the Watch page:** Users can subscribe to a channel by viewing a video on the *Watch page* — the page where viewers watch a video. The Subscribe button is underneath the left side of the video next to the channel thumbnail and name. Chapter 2 describes the characteristics of the Watch page.

FIGURE 8-2: The Subscribed button shows options for existing subscribers.

- **Custom links:** Channel managers can create subscription custom links that appear on the channel's About section that pops up when you click . . . More from the channel description. Start with the following line of code and add the name of your channel to *yourchannelname:*

  ```
  http://www.youtube.com/channel/yourchannelname?sub_
    confirmation=1
  ```

- **Links in video descriptions:** Subscriber links can be useful in the descriptions uploaded as part of your video metadata. Just use the subscription link code shown in the preceding paragraph. Chapter 7 describes how to modify and optimize (for video SEO) a video description.

  Subscription links can grow long and unsightly. Don't be afraid to substitute a shortlink instead. You also get additional tracking to see which subscription links generate the most clicks. Chapter 7 introduces shortlinks and the software needed to track them.

- **Links on end screens:** End screens are a helpful way to add a subscription link to a video. YouTube provides all the tools necessary to handle the task without requiring you to do any video editing. Chapter 7 explains end screens as well.

- **Web URLs:** It's easy to get people to subscribe from places not on YouTube: Just include a Subscription link, like the one shown earlier. Clicking the link brings them to a YouTube channel, so determine whether you want the link to open in another tab or window if you don't want the subscriber to exit your site.

WARNING

TIP

Many channel managers put a link to the channel page as the target of the Subscribe link. If you want to bring people to your channel, please let them know that — otherwise, make the Subscribe button trigger a subscription request.

- **The old-fashioned way:** Have your video personality look straight into the camera and ask them to subscribe. There's no harm in asking. "Like and subscribe for more tips!" Everyone's favorite request!

REMEMBER

You can ask viewers to subscribe in many ways — don't feel that you have to use only one method. YouTube allows a good deal of flexibility in generating subscription requests, so go ahead and experiment to see what works best for your audience.

Specifying how subscribers get updates

Being a subscriber to a channel is a lot like being a supporter of a local museum: You get notified first about events, and you get to see things before anyone else. Yes, being a subscriber has its benefits. Subscribers have the following options when it comes to being notified:

- **All Notifications:** This option notifies subscribers when you upload a video (all long form; they may also get some personalized notifications for Shorts based on their subscriptions and watch history).
- **No Notifications:** Subscribers do not receive notifications in any case.
- **Personalized Notifications:** Notifications are sent based on the subscriber's behavior.

WARNING

Your subscribers are your gold, so keeping them happy with your channel and the frequency of your notifications is important. If they receive too many from you, they may unsubscribe; too few and they may forget about you. Moderation is important. Many successful channels create "programming" and share that with their audience so they know what to expect. Similar to your old favorite sitcom, top YouTube channels publish their videos at the same time every week, biweekly, or even daily. Their audiences then know what to expect and look forward to their new videos.

You should also understand how your subscribers actually receive your channel updates:

- Email
- Mobile device notification
- Accounts connected to social media

In addition, subscribers can receive updates from several areas of the YouTube platform:

- **Home:** When viewers log in to YouTube, click the YouTube button in the top-left corner of their browsers, or start the YouTube app on their mobile devices, they land on the homepage.

  This page is customized for each user because YouTube makes video suggestions based on a viewer's subscriptions and recommendations derived from their viewing history.

- **Subscriptions:** When viewers are logged in, they find their subscriptions on the left navigation of their homepage or at `www.youtube.com/feed/channels`.

REMEMBER

Setting the channel feed and privacy levels

You can control the visibility of your subscriptions using your channel's account settings.

To do so, follow these steps:

1. **Log in to your YouTube account.**
2. **Go to `www.youtube.com/account_privacy`.**
3. **Use the toggle to select Keep All My Subscriptions Private.**

REMEMBER

Your public channel uploads are automatically part of your feed and can't be hidden or omitted by using the feed settings or privacy settings. Only subscribers can specify whether they want to be notified about your new public videos.

Treating subscribers and nonsubscribers differently

To provide a more customized experience for viewers, YouTube allows you to treat subscribers and nonsubscribers differently when they visit your channel. (Subscribers don't necessarily want to see the same video when they show up at your channel, because they've likely already seen it, so it makes sense to treat them differently from nonsubscribers.) The following sections explain several options for updating your channel trailer to customize viewer experience based on subscriber status.

Working with a channel trailer

The *channel trailer* is a prominent video that's shown whenever viewers first arrive at your channel. It's your chance to convert nonsubscribers, inform them about what they can expect from your channel, get them excited about you and your content, and give them the details of your programming schedule. This is essentially your movie trailer for your YouTube channel.

REMEMBER

You can set up two different channel trailers — one for visitors who have not subscribed to your channel and one for returning subscribers. Approach these with different strategies, as you'll want to show the most important video to nonsubscribers to make them want to subscribe. For returning subscribers, update your channel trailer regularly with the most recent video so your channel provides fresh information when they visit your channel.

Customizing your channel trailer

Before you update or add a new channel trailer, make sure you have uploaded the file to YouTube. If you need help with this process, see the section entitled "Uploading to YouTube" in Chapter 7. Once your trailer has been uploaded, follow these steps to set it up:

1. **Log in to your YouTube account.**
2. **Click the Channel icon in the top-right corner of the YouTube homepage and choose Your Channel from the menu that appears.**

   The My Channel screen appears.
3. **Click the Customization button on the left side, under your channel name.**

   Doing so brings you to the Channel Customization page of YouTube Studio where you can modify your channel's homepage (see Figure 8-3).
4. **You will see the two spots for channel trailer options — for people who haven't subscribed and for returning subscribers. If you have not added a channel trailer yet, click the Add button.**

   If you have a channel trailer but want to update it, click the three vertical dots on the right next to the options to change the video or remove the video.
5. **In the popup dialog box that appears, choose the desired channel trailer video from your uploads or enter the YouTube video URL.**
6. **Make sure the title and description of your chosen video are ready to go, as this metadata will be shown alongside the trailer.**

   You will need to edit the metadata on the video in YouTube Studio under the Videos tab. Adding and editing metadata is covered in Chapter 7.

TIP

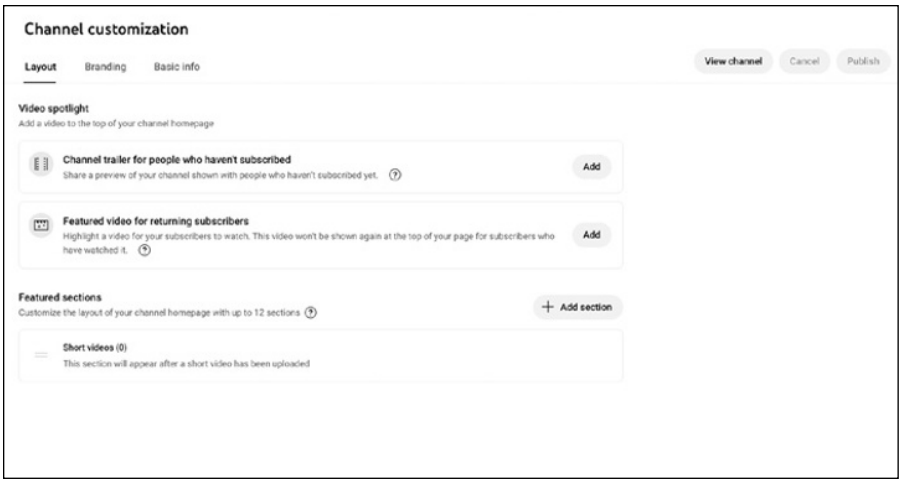

FIGURE 8-3: YouTube Studio setup for adding a channel trailer.

Managing Comments

Many people tend to forget that YouTube is also a social media platform. That's a bit odd because it's one of the most heavily trafficked websites on the planet. In fact, one reason YouTube is so effective for creators and companies is precisely that its platform provides a powerful connection not just between a viewer and your brand but also among your audience.

Think of your Comments section as Yelp for your videos. Your viewers can give you reviews and comments in real time. Remember, feedback is a gift, so you want to engage and learn from your viewers.

Seeing why comments matter

Your interaction with your viewers and channel visitors is an important signal to not just your current subscribers but also your potential subscribers. It tells them that your brand and your channel and content are worth their time. Encouraging comments is a great way to grow an audience while learning from your community.

REMEMBER

Make a concerted effort to add your own follow-ups to comments posted when you upload a video. Channel programming is about regularly scheduling uploads. Channel *manager* programming is about always responding to comments in a timely manner.

Your options for managing any particular comment are listed here:

- Approve the comment
- Approve and respond to the comment
- Remove the comment
- Report spam or abuse
- Hide the user

You typically approve and respond to comments. You learn about the details of managing comments in the following sections.

REMEMBER

Similarly to likes and dislikes on video, viewers can like and dislike comments. Pay attention to comments that receive large numbers of both likes and dislikes.

TIP

Viewers generally appreciate being recognized by creators and channel managers. You can add the name of a viewer in a comment by typing a plus sign (+) and then their name. YouTube helps by autocompleting the name, so you're assured that the person will be notified of your outreach.

You can respond to comments in one of two ways:

REMEMBER

- **On the Watch page:** Both viewers and channel managers can add comments just below the channel description. The Comment field is in the All Comments section; just type right where it says, "Add a comment. . .".

  Commenters must be logged in to make a comment. If they aren't logged in, YouTube asks them to do so.
- **From the Channel Comments section in YouTube Studio:** Only channel managers can comment here or reply to a comment. You can also add a thumbs up or thumbs down or "heart" a comment.

Setting up your channel for comments

You may hear some people say not to allow comments on your channel. We're convinced that you give up much of the effectiveness of YouTube by following that advice. Much of the concern that folks have about comments stems from the fact that some channel managers have done a less-than-stellar job around content moderation, which means that some channels' Comments sections turn into toxic cesspools.

There are examples where it makes sense to turn off comments, but those should be treated as edge cases, and not the norm. You can turn comments off video-by-video (more on how later in this section) and that may be an option for specific videos where you do not want your audience to engage.

WARNING

If all of your videos have turned into a toxic cesspool of anger, that is a sign of a channel manager falling down on the job, not proof that comments can't work in a YouTube context. In the next section, you can find tips and techniques you'll need in order to keep yourself from falling down on the job.

First, you need to decide what level of channel comments you're comfortable with. Here's how to set up comments channel-wide:

1. **Log in to your YouTube account.**
2. **Click the Channel icon in the top-right corner of the YouTube homepage and choose YouTube Studio from the menu that appears.**
3. **Select Settings in the navigation bar running down the left side of the page.**

   Doing so opens a dialog box.
4. **Under Upload Defaults, select the Advanced Settings.**
5. **Under Comments On, click Comment Moderation to expand these options:**
   - **None:** Don't hold any comments. "Holding" a comment means that YouTube does not post it. It's held in the Held for Review area until you review it and specifically tell YouTube what to do with it.
   - **Basic:** Hold potentially inappropriate comments.
   - **Strict:** Hold a broader range of potentially inappropriate comments.
   - **Hold All:** Hold all comments.
   - Or, you can choose to disable all comments by choosing Off.
6. **Click Save after you have chosen the correct settings for your preferences.**

TIP

Though we feel that it's important to choose what's best for you as a channel manager, our recommendation is the second one (Basic): Hold potentially inappropriate comments for review. The algorithms Google uses to flag comments are quite sophisticated, so they do a good job. You can always come back and change the setting if you feel differently.

With your channel enabled for discussion, your videos can now receive comments. You can also control comments on a video-by-video basis. You have three ways to enable comments on individual videos:

- **Default:** YouTube allows all video comments by default.
- **Upload defaults:** In YouTube Studio, under Settings; refer to the preceding list.
- **Advanced settings:** In the YouTube Studio Video section, set the comments controls for an individual video by hovering the mouse cursor over the video title in order to display the Comments Edit icon.

Moderating comments

As your audience engages more and more with your videos and as your channel becomes increasingly successful, comment moderation on a video-by-video basis can become rather tedious. Fortunately, YouTube allows you to moderate comments all in one place — in the Comments section of YouTube Studio. To start moderating, follow these steps:

1. **Log in to your YouTube account.**
2. **Click the Channel icon in the top-right corner of the YouTube homepage and choose YouTube Studio from the menu that appears.**
3. **Select Comments from the navigation bar on the left side of the screen. You will see the following options:**

   - **Published:** These are the comments currently posted on your channel. You can do all the standard things with these comments — allow the comment, reply, like, or dislike the comment, heart the comment, remove the comment, report the comment as spam or abusive, or ban the commenter from the channel.

     Whether you're on the Watch page or in the Comments section, the icons and dropdown menus to the right allow you to remove a comment, block a commenter, or report spam. (You'll probably make much use of the Trash icon, which quickly vaporizes an inappropriate comment.)

   - **Held for Review:** As mentioned, comments are held here when you don't allow automatic posting or when comments are caught by the Hold for Review filters you set in the community guidelines. If the comment is acceptable, click the Check button; otherwise, click its associated Trash icon to remove it. Be sure to review your held comments regularly so the appropriate ones are posted on your channel in a timely manner.

REMEMBER

TIP

Anything you can do to a single comment on the Comments page — accept, respond to, delete — can be done to multiple comments in one fell swoop. Simply check one or more of the comments you're moderating and take bulk action.

Reacting to inappropriate comments

As a channel manager, you need to draw the line on what comments are appropriate to be shown on your channel. Just because someone disagrees with you doesn't mean you have to call out the military. Some channel managers and creators like a debate, but in certain situations, comments are abusive and inappropriate and provide no benefit to you, your viewers, or your community.

With comments, you have the following options:

- **Remove:** This option simply deletes the comment.
- **Report Spam or Abuse:** Comments and those who comment are subject to the same community guidelines. The Report Spam or Abuse flag is there to report a guideline violation, not a channel or video comment disagreement. See the next option if community guidelines are adhered to yet you still need to address a situation.
- **Hide User from Channel:** Sometimes you just need to divorce yourself from certain viewers. This setting prevents them from posting comments. If circumstances change and you want them back, you can remove them from the Hidden User list in your Community settings. (For more on Community settings, see the next section.)
- **Always Approve Comments from This User:** Save yourself time by always approving comments if you know and trust a user.
- **Add This User as a Comment Moderator:** Use good judgment and take advantage of a little help from your friends for comment moderation.

Configuring Community Settings

You've probably noticed some similarities between comments and the Discussion tab on your channel. Both of these involve the management of users. YouTube makes it easy to manage users from a central location known as Community settings. To access Community settings, do the following:

1. **Log in to your YouTube account.**
2. **Click the Channel icon in the top-right corner of the YouTube homepage and choose YouTube Studio from the menu that appears.**

3. **Select Settings in the navigation bar running down the left side of the page.**
4. **Choose Community from the Settings navigation menu on the left side of the screen.**

Figure 8-4 shows the Community settings page.

FIGURE 8-4: YouTube Community settings.

The Community settings consist of two sections:

- **Automated filters:** Some viewers are constructive, and some viewers aren't. That's just the nature of YouTube. This is where you manage:
  - *Moderators:* Enables these users to remove comments, which then appear on your Held for Review page; these folks can also moderate your live chat messages.
  - *Approved Users:* Enables the automated posting of comments and messages from identified users; it even allows them to post comments that include blocked words, links, or inappropriate content.
  - *Hidden Users:* Comments and live chat messages from these users don't show up on your channel. After you hide them, it may take a couple of days for their comments to disappear completely.

  Both approved and banned users can be managed using their YouTube channel URLs.

REMEMBER

- *Blocked words:* Comments and live chats that match phrases or words in this list are held for review.
- *Block links:* New comments with hashtags or URLs are held for review. Live chat messages with URLs are blocked for the safety of all users.

» **Defaults:** From here, you can manage whether you allow comments to be added to your videos, enable comment moderation, and review live chat messages before they are posted.

WARNING

Think hard before disabling comments. It's tough to develop a community when you've taken away a key engagement component of YouTube.

Getting Viewers to Engage

After you have a solid channel and an active audience commenting, messaging, and sharing your content, you have to ask whether they're doing everything you expected. In Chapter 1, we talk about establishing the goals for your channel. Some of those goals may be YouTube-related, such as attracting more views and subscribers, or they might be more commerce-oriented, such as influencing a brand decision and driving a product purchase from a website. Either way, you need to entice your audience to click on the video and take the next action. End screens and comprehensive video descriptions are some of the best tools at your disposal for drawing post-view clicks.

Audiences engage with your channel, but they also come to recognize your brand — those unique elements that tell the world that your content is yours rather than someone else's. YouTube recognizes that branding is a big deal in our content-saturated world. That's why it goes out of its way to provide some additional capabilities to apply branding without forcing you to invest the additional time and effort that always come with an additional video edit.

REMEMBER

Branding was previously known by its more confusing name: *InVideo programming*.

When it comes to branding, YouTube allows channel managers to add a brand watermark to the bottom-right corner of the video player. To set up such branding for your channel, follow these steps:

1. **Log in to your YouTube account.**
2. **Click the Channel icon in the top-right corner of the YouTube homepage and choose YouTube Studio from the menu that appears.**
3. **Select Channel Customization in the navigation bar running down the left side of the page.**

4. **On the new page that appears, select the second tab, Branding.**

   The screen shown in Figure 8-5 will appear.

5. **Select Video Watermark.**

   You can upload an image that's in PNG or GIF format, 150x150 pixels, and 1MB or less. This watermark should be simple and transparent, if possible — something eye-catching and easy to read or understand, because viewers will see it on mobile phone screens, which are relatively small.

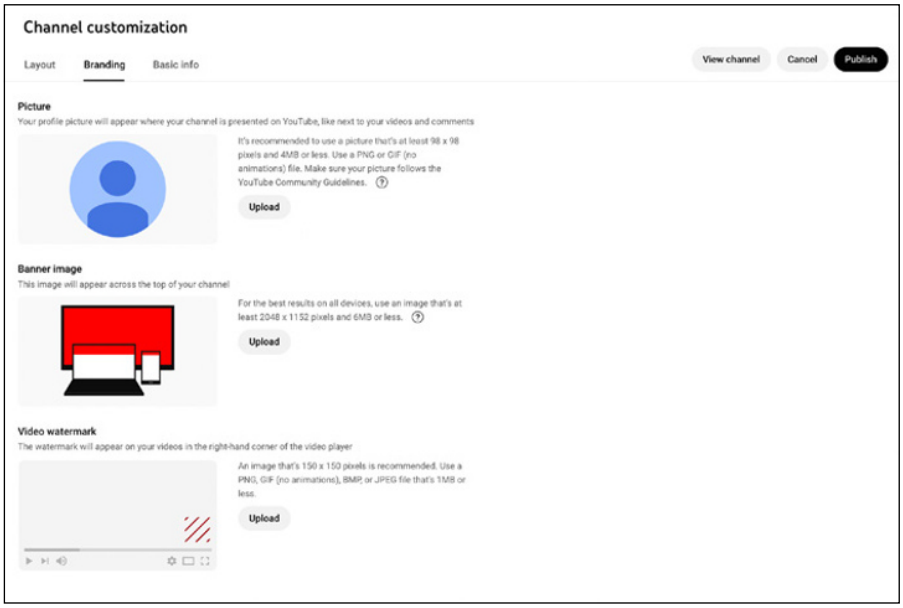

FIGURE 8-5: The YouTube channel Branding preview and upload page.

REMEMBER

You can always remove or update the watermark later, if you don't like it or if you change your branding.

Capturing the Captioning Opportunity

You don't have to let language and sound be barriers to connecting with your audience. YouTube provides tools for subtitles and closed captions, which allow viewers who are hearing impaired or who don't speak your language to watch and understand your videos. Adding subtitles and closed captions can even have a positive impact on your video's YouTube Search results.

By the way, don't let the thought of dealing with closed captions and subtitles scare you. Working with these elements is similar to working with any other video element on your channel — in this, as in all matters, YouTube Studio is your friend. Use the following steps to create subtitles and closed captions:

1. **Log in to your YouTube account.**
2. **Click the Channel icon in the top-right corner of the YouTube homepage and choose YouTube Studio from the menu that appears.**
3. **Select Subtitles in the navigation bar running down the left side of the page.**
4. **On the new page that appears, you can view which of your videos is using subtitles, your drafts, and published subtitles.**
5. **To add subtitles to a video, navigate to that video in the All tab, which is in the navigation bar at the top of the page.**
6. **Click the specific video.**
7. **On the Video Details page, click the Add Language button and select the language you want to use for your subtitles and captions. Click the Confirm button.**
8. **After selecting a language, it will appear in the list. Hover over the dash for subtitles and find the pencil Add button.**

   This will open a menu to upload a file, as shown in Figure 8-6.

REMEMBER

   You may need to choose your language or search for it in the search box first. After your language is selected, you're prompted to choose how to add your subtitles or closed captions.

9. **Select a captioning/subtitle method:**
   - *Upload a File:* Add a text transcript or timed subtitles in the form of an uploadable file.
   - *Auto-Sync:* Type or paste a transcript into the video transcript box that comes up to the right of the video. YouTube autoconfigures the timing.
   - *Type Manually:* Add captions as you watch the video by either uploading a transcript file or entering the text directly into a transcript box. You can pause and play while doing this.
   - *Auto-Translate:* To use auto-translate, publish captions in the original video language first. Note that auto-translate is unavailable for auto-generated captions.
10. **Click Publish after choosing a captioning/subtitle method.**

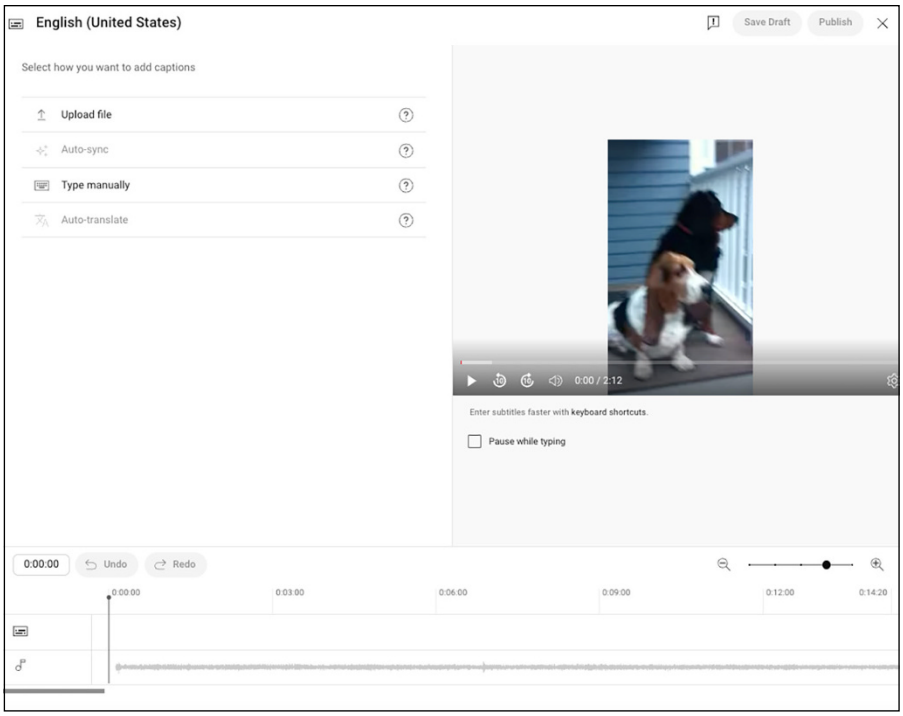

FIGURE 8-6: Choosing how you to want add captions.

Producing Live Events

Putting together live events on YouTube is a great way to build an audience and drive engagement. You have several options for managing live content on YouTube:

- **YouTube live events:** Livestreaming with active management of the comments. You can livestream from your house, on set, or anywhere with good connectivity.
- **Off-platform events:** Consider livestreaming in real life at an event. Grab the opportunity to meet with your fans in real life, outside of your usual shooting locations. Many YouTube creators use physical community events, such as VidCon (`www.vidcon.com`), to meet with their fans — and shoot some live content with them.

Repurpose your live event content for your channel. Your audience will love the attention.

TIP

If you aren't ready to host a livestream but you want to share a live moment with your viewers, you can publish a video as a *Premiere* instead. Premieres use a regular prerecorded and produced video. You set a date and time you want your video to premiere and at that exact time, you and all your viewers can watch the video together as it premieres. Premieres remind your viewers when the video is going live. While it premieres, viewers can engage via a live chat.

Premieres are a great way to build interest for a new video, interact with your audience, and encourage more views and engagements at the start of your video being published. You can select a video to be a Premiere in the upload process or on the Video Details page when editing the video's metadata.

Using Other Platforms to Build Your Audience

YouTube is no longer the only game in town for building audience engagement. Other platforms have video and social engagements that build an audience and a following. Most of the top YouTubers now invest in other platforms — including Instagram, X, TikTok, and Twitch — to build their fanbase. Depending on the type of channel you want to build, think about what other platforms your audience may be on when they are not on YouTube.

- Do you have a home design business? Your audience may be on Pinterest as they are thinking of their new kitchen designs.
- Are you trying to build a gaming channel? You may need to start a Twitch account.
- Are you building short videos from your content to include as YouTube Shorts? You might also want to post these on Instagram.

The bottom line is that YouTube still is the best place for long-form videos. You can use other platforms as a teaser to push people to watch your full videos on YouTube. You can also use other platforms as a place to build your brand and have a more holistic social media strategy. Consider these platforms:

- **Instagram:** Built originally for beautiful photography and stills, Instagram has morphed into an every-day posting platform with Stories and fun videos like Reels (similar to YouTube Shorts). Think about using Instagram if you are building a style, fashion, photography, family, pet, or design channel.

- **TikTok:** TikTok was originally a music platform, but it now is all things short-form video. TikTok is a great place to build your audience if you are trying to reach younger fans. Think about using TikTok to build your audience if you are building a music, dance, or comedy channel.
- **Twitch:** Twitch is a live-stream platform. A majority of audiences go to Twitch looking for gaming content. If you are building a gaming audience, you should think about a Twitch strategy.
- **X (Formerly Twitter):** X is a platform built for quick updates in real-time. X is a good way to notify your audiences of livestreams or live events. X is a good platform for any industry where you want to communicate quick updates.
- **Pinterest:** Pinterest is a place where you can save things from across the internet and "pin" them into customized boards. Think about finding your audience on Pinterest if you have style, fashion, home design, or DIY-type content.
- **Other:** Depending on your channel goals and topics, you may have a niche audience that is on other social media sites. Do some research on where your audience spends their time when they are not on YouTube.

IN THIS CHAPTER

- Defining your content north star
- Creating a content calendar to keep your audience coming back for more
- Mastering different video genres
- Using different formats to get the most engagement from your audience

Chapter 9

Creating Your Content Strategy

Remember the excitement of turning on the TV during prime time TV and seeing your favorite show? The anticipation all week for Thursday night TV? Or remember flipping through the TV Guide and finding out the lineup for your entire week? Well, you can replicate that excitement with your audiences by creating a content strategy that keeps them coming back for more. But, just like those prime time TV lineups, YouTube channels aren't built by throwing ten videos up at once and hoping people watch. The best channels thrive on strategic planning, careful analytics, thoughtful content, and audience engagement. In this chapter, you learn how to create a strategic content strategy that will attract a new audience and keep them coming back for more.

To have a thoughtful content strategy, it's best to treat your YouTube channel like a prime time TV show. This chapter dives into the world of YouTube content creation with that lens.

Determining Your Content North Star

Just like a prime time television show has crafted their programming schedule and content types, a YouTube channel also needs a guiding light, or a "North Star." Think of your "North Star" as your channels' purpose, or your "why." Why did you create this channel? What value are you bringing to your audience? What made you move from just a viewer of videos, to a creator? What sets your channel apart from all the other channels, and what makes you the right person to bring this to the masses?

Defining your "North Star" isn't just about choosing your niche or channel subject, it is really about understanding *why* you create content, and *why* your viewers will keep coming back for more. It's up to you to define the North Star, tone, and feeling of your channel.

Think about your favorite show growing up — each week you were excited to see something new, but there was a certain predictability to the content. You knew the general place, purpose, characters, and overall tone of the show — that is what kept you coming back for more. Similarly, your YouTube channel should have some predictability for your audience.

Just as your favorite Thursday sitcom or Netflix Cartoon may promise laughter and fun characters, your North Star guides the creation of content that fulfills a specific need or desire for your audience, ensuring they keep tuning in to your channel.

The following sections delve into some thought-starters to get you started on your North Star.

Purpose and vision

To determine your purpose and vision, consider these questions:

- **What gets you excited?** Remember that a lot of work will need to go into your content and your YouTube channel. Make sure the content excites you, and you are truly passionate.
- **What are your unique skills?** Why should your viewers turn to you on this subject? What separates you from others in the space?
- **What are your values?** Even if you are making a channel about food recipes, you can still think about what values are important to you and how you can weave them throughout your content.

- **What is your personality?** You want your personality to shine through. Are you the class clown? Maybe you shouldn't have a show on serious topics. Are you known to go into detailed descriptions and tell long stories? Maybe you shouldn't have a channel focused on YouTube Shorts. You want your channel to always feel authentic, so remembering your core personality traits is always important.

An example is Caitlin Shoemaker's YouTube channel at `www.youtube.com/@caitlinshoemaker`, which defines its purpose and vision as creating easy-to-follow vegan food recipes for everyone. You can tell this because all of her videos are centered on accessible vegan recipes that look easy and inviting.

Audience and focus

To determine your audience and focus, consider these questions:

- **Who is your ideal audience?** Imagine walking on stage to your YouTube show. Who is in the audience? Once you have a following, you can continue to learn more about your audience in your YouTube Analytics (more on this in Chapter 10).
- **What problems are you solving for your audience? Why do they tune in?** Remember why you tune in to your favorite shows. Are you looking for a new recipe? A good laugh? A new book? What value do you want to bring to your audience?
- **What sets you apart?** Think about what your friends say to you when you say you are starting a YouTube channel. "Oh, you know everything about fixing TVs!" or "I would listen to you talk about trains for hours." Think about how that makes you different from other channels that exist and lean into those differences.

One example is the YouTube channel Preppy Kitchen, at `www.youtube.com/@PreppyKitchen`, which defines its audience as people who love to cook and bake. John Kanell, the creator, posts detailed, long-form videos for his baker community.

Video type and formats

There are several video types and formats you can use when creating your YouTube channel. The *type* refers to the kind of video you choose to create, from a how-to video to a documentary. The *format* is how you display your video — as YouTube Short, podcast, vertical video, or long-form video. To decide on the best video types and formats, consider these questions:

- **What format fits your personality?** Are you a "camera directly in your face" type of creator? Or a podcast with a microphone type? Your formats should support your video content.

- **How long will your videos be?** The length of your videos will affect some of your content strategy. Are you making documentaries, or telling quick jokes?
- **What types of videos are others in your space making?** This may be a helpful theme for you to learn from, or a way for you to stand out with new video types.

REMEMBER

YouTube Analytics is a great tool to help you answer some of these questions with data. When you start a new channel, you may need to answer these questions based on your expertise. But, as you get more data you can verify your hunches with real data! See Chapter 10 for more information on YouTube Analytics.

Defining Your Niche

Once you have defined your vision and goals for your overall YouTube strategy, it is time to lean into your content niche. Defining your YouTube niche involves finding your special corner of the Internet that makes your content special. This means identifying the topics, themes, and sayings that make you special. If you are creating a beauty channel, what sets you apart from all the others? Do you have a special saying, catch phrase, or personality? Do you make sure to focus on a certain skincare tip in every video? Your niche can be many different things — but it has to be specific to you!

TIP

Your niche should also align with your overall content on your channel and support your vision, passion, and expertise. Remember to think about what makes you different, but also what makes you excited to start your channel. Also, remember your discoverability on YouTube — what things might people be searching for that you can help them with?

By finding the sweet spot between your strengths, your personality, and what people want to watch, you can create your channel niche! Your niche can help inform your overall content strategy. Be sure to keep it consistent throughout all of your videos.

Here are a few examples of niche-focused YouTube channels:

- **Peruse Project (`www.youtube.com/@PeruseProject`):** This channel has found their niche focused on reviewing books. You can tell her channel is focused on books right when you land on the channel with most of her thumbnails in front of book shelves. You can even tell the genre of books she likes based on her YouTube channel shelf organizations.

» **Primetime Pickleball (**`www.youtube.com/@primetimepickleball`**):** This channel is focused on teaching the game of Pickleball. You can see from the thumbnails this channel is dedicated to tips, tricks, and learning the game.

Defining Your Personality

Think of defining your YouTube channel's personality as deciding what your personality will be when you are headed to a party with new people. What do you want these people to remember you by? How will you connect with this new group of people? What is the special sauce that will make people say they enjoyed your company? What is the mix of voice, tone, mannerisms, and overall vibe that define you as person? Now, which of those personality traits do you want to shine on YouTube?

TIP

Your YouTube personality does not need to match your real-life personality exactly. But, you want to make sure it feels authentic and real to the audience. It is okay if you wouldn't feel comfortable speaking in front of 1,000 people in an open room — but you enjoy doing it behind a camera. It may be okay that you're not a social butterfly in real life, but sound very outgoing on camera. It is important that it feels real so that the audience can connect with your content. Your personality should also match your content type. If you are a DIY home renovation channel, it would be confusing to the viewers if you were very disorganized. It may feel more authentic for you to have a can-do friendly attitude. Remember to lean in to your strengths to make your content feel authentic — and easier for you to produce!

Your personality can inform your content strategy by influencing the way you present information, interact with viewers, and style your YouTube channel, videos, and thumbnails.

Considering the Types of Content You Should Make

There are many different types of content you can make on your channel. As you start out, you should test different lengths and different content types. You may need to experiment with different types of videos to see which resonates with your audience. Most likely, you will end up with a mix of these types of videos and need to think about how each video fits in your overall content strategy.

Here are a few examples of different types of content:

- **Tutorials or how-tos:** Search on YouTube, and you'll find endless videos that explain how to do everything from kissing your date after the prom and drawing a freehand circle to replacing an iPhone screen and making an epic movie trailer. YouTube even has videos on how to make a how-to video! Some of these how-to videos provide lessons that are quite informative; some are also entertaining. Tutorials and how-tos are some of the most popular content on YouTube and a good way to teach your audience something you are an expert at.
- **Unboxing videos:** These videos focus in on a creator opening something new directly from the package. This could be a child opening a new toy, a technology reviewer opening a new iPhone, or a fashionista opening a vintage pair of shoes. Audiences get to see something they may not be able to purchase themselves. Marques Brownlee's channel at `www.youtube.com/@mkbhd` is a good example of popular unboxing content (see Figure 9-1).

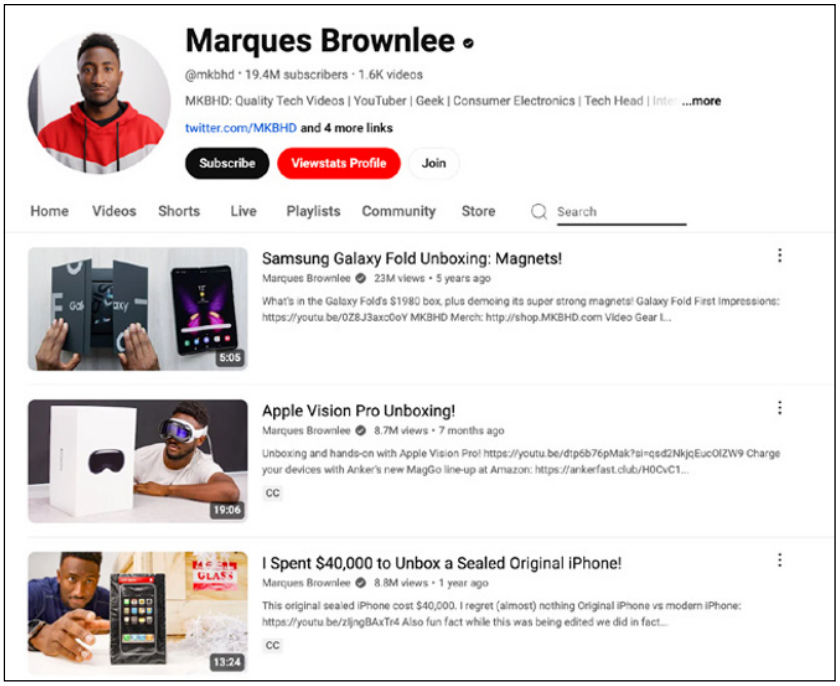

FIGURE 9-1: Marques Brownlee's unboxing channel.

- **Review videos:** YouTube is a place where people go to learn about what products they should buy or what cars they should drive. Popular YouTube creators review products in detail, rank products from best to worst, and test products to their limits. For example, the YouTube channel Techrax, at `www.youtube.com/@TechRax`, has millions of views about dropping smart phones and reviewing their durability. Viewers trust reviews they find on YouTube, so it is important to be fair and honest when reviewing content on YouTube to build credibility with your audience.
- **Educational videos:** YouTube has become a great place for people of all ages, education levels, and interests to learn. And why not? It's a central location where viewers can find out about just about any topic. You'll find history lessons, teaching aids, and current events coverage all on YouTube. No matter your YouTube channel genre, you can include educational videos on your subject.
- **Challenge videos:** Popularized by early YouTube creators like Dude Perfect, challenge videos began with sports trick shots and games. Today, they have evolved to include charitable challenges, extreme food creations, and just about any competition you can imagine. Challenge videos can be a great way to collaborate with other creators. Many creators will challenge each other to something serious or silly to help expand their communities or raise money for charities.
- **Reaction videos:** These videos feature people watching and reacting to other videos while recording their responses. The creator adds value and engages the audience by laughing, expressing disgust, or providing commentary. These videos are popular across genres, but have become some of the top viewed video-types in movies, TV, and gaming.
- **Vlogs:** Some of the most successful content creators on YouTube are *vloggers* (video bloggers). The vlog has, in fact, become a staple of YouTube. Some vlogs are quite funny, and others, truly informative; some are simple, and others are highly produced. Vlog content typically features the creator talking about travel, beauty, or simply sharing their everyday life. For example, YouTube creator Taylor Bell (`www.youtube.com/@TaylorBell`) vlogs her everyday life as a 20-something living in New York City.
- **Film and documentary videos:** YouTube has liberated the stage or, more appropriately, the screen for filmmakers of all levels by allowing them to reach a global audience. Not that long ago, you would make a short film and then physically show it to your friends and colleagues in a dank screening room, a classroom, or (more than likely) your own basement. YouTube now gives you the platform to share your film with the world. Regardless of your expertise, you can create and share short films, full-length movies, or documentaries with global audiences.

- **ASMR (Autonomous Sensory Meridian Response) videos:** This term describes the good feeling you get when you hear certain noises. These videos are used by many to relax with noises like rain drops on a window, meditative music, purring cats, or whispering. Even if your channel is not focused on relaxation or meditation, you may be able to add ASMR videos.
- **Music videos:** Music has become a significant part of any YouTube creator's content strategy, even if they are not aiming to be the next Taylor Swift. With the rise of YouTube Shorts, many creators now need to consider how they incorporate music into their content. YouTube Shorts often have music paired with the content and go with a musical trend or dance specific to the music.

Creating Your Content Calendar

A *content calendar* is a schedule that determines when you'll upload your YouTube videos. Creating your YouTube content calendar is like creating your own personal TV guide for your YouTube channel. You can use any format and tools that are most helpful for you to stay organized but try to create something that you will stick to and avoid any procrastination.

Researching for your calendar

Here are some things you should think about and research before you build your first content calendar:

- **Publishing frequency:** How often do you plan to publish? This needs to be a balance of how often you can make time and produce content that you want to add to your channel, and how often you think your audience will want to consume new content.
- **When to publish:** Believe it or not, the day of the week you publish is actually important to your channel views. A majority of views for most videos come within the first 72 hours, so day of the week is important. If you only publish on Saturdays, but your audience is looking for content on Thursdays, other channels that publish on Wednesdays may end up higher in search results. This is an insight you will get better at over time, when you can look in YouTube Analytics to see what days your audience is most engaged.
- **Length of video:** Similar to "when" to publish, the length of your videos is very important to your audience and for discoverability. If a user wants a quick DIY

video, but you make an hour in-depth video, they will skip it for the quick version. When you are first creating your YouTube channel, you can test several lengths of videos to learn what your audience is most likely to engage with. Be sure to include a mix of YouTube Shorts (vertical videos under three minutes) and longer form content. Some channels opt to specialize in either YouTube Shorts or longer form videos, depending on their content, but it is always a good idea to experiment and learn what works best for your channel.

- **Tentpole events:** When planning your content calendar, think about holidays, events, or seasons that may affect your content.
- **Category of your videos:** If you are creating different types of content, keep an eye on creating a balanced channel to make sure you will be able to create themes on your channel that seem balanced. You will actually want to lay out your channel based on these themes (called *sections*, more about this later in this chapter).
- **Target audiences:** If you have several niche audiences, make sure you know which audience you are trying to reach with each video. If you are trying to reach teenagers and parents of teenagers, make sure your content is balanced to reach both audiences.
- **Cross promotional content:** Remember that your audience does not spend their day only on YouTube. Think about the content you will want to create on other platforms to get people to your YouTube channel. Successful YouTube creators often use other social media platforms to drive views on their YouTube channel. For example, you may have a long documentary-type film on YouTube but you may create small teaser versions to promote on Reels (Instagram) or TikTok.

Considering consistency and scheduling

Remember that you will be running your channel like a prime time TV show. So, consistency and scheduling is imperative to keeping a happy audience. The good thing is that you do not need a Network CEO to pick your TV slot for you, you get to pick when and where you publish your content. Consistency is important, because like a network TV show, your audience wants to know when to expect new content. Many YouTube creators have had success putting this information in their channel trailer, or in their channel banner art, that says "New Shows each week on Mondays at 7PM EST." As you get more analytics and engage more with your audience, you will learn how to optimize you channel based on data. To start a new channel, it is important to be consistent and lay out a specific schedule that you can stick to.

Choosing Your Organizational Tools

There are many tools that will help you stay organized for your content calendar on YouTube and other social media platforms. Some tools like Sprout Social and Later can help you post to social media channels when you want, without having to do the uploading. These tools will also help you organize your content calendar and stay on track. When you are just getting started, it is okay to use free tools like Google Sheets, or tools you may already have, like Microsoft Excel or Microsoft Word.

TIP

In the beginning, don't get too caught up on the tools you are using to create your content calendar. Pick whatever you have access to and stick with it. The trick is to stay organized and consistent. You can even start with a pen and paper!

The following table is an example of a content calendar for a DIY home renovation YouTube channel. This fictitious channel has identified their niche and focus as home DIY projects. You can see that the creator is sticking to a weekly cadence of uploads and has a clear and consistent category of videos.

Target Publish Date	Video Category	Video Title	Target Length	Notes
9/1	Kitchen - DIY	Do's and don'ts of painting your own cabinets	10 minutes	This will be an overview of the plusses and minuses of painting your own cabinets.
9/8	Kitchen – Budget Hacks	Painting your granite counters to look like marble	20-25 Minutes	Overview and show examples and what to purchase.
9/15	Kitchen – Quick DIY	Weekend backsplash project	15-20 minutes	Overview and show examples and what to purchase.
9/22	Kitchen - DIY	Installing new tile floors yourself	20-25 minutes	Overview and show examples and what to purchase.
9/29	Bathroom - DIY	Bang for your buck in the bathroom	10-15 minutes	How to do quick bathroom hacks with small budgets but big impact.

This next table shows an example of a content calendar for a travel and food focused YouTube channel. This fictitious channel has already identified its niche to find local hot spots in different cities. You can see that the creator is sticking to a cadence of uploads and has a clear and consistent category of videos. Note that the content lengths are shorter than the DIY channel, and they are using different video formats to reach their audience. Because this channel has chosen to focus on YouTube Shorts, you can see they also changed their publishing schedule to every day, instead of every week.

Target Publish Date	Video Category	Video Title	Target Length	Notes
9/1	Travel - Shorts	Where to find the best hotdog in Chicago	60 seconds	This will be a vertical video featuring five famous hotdog restaurants in Chicago.
9/2	Travel - Shorts	Where to find the best pizza in NYC	60 seconds	This will be a vertical video featuring five famous pizza restaurants in New York City.
9/3	Travel - Shorts	Where to find the best lobster in Maine	60 seconds	This will be a vertical video featuring five famous lobster restaurants in Maine.
9/4	Travel - Shorts	Where to find the best Clam Chowder in Boston	60 seconds	This will be a vertical video featuring five famous Clam Chowder restaurants in Boston.
9/5	Travel - Shorts	Where to find the best Crab in Maryland	60 seconds	This will be a vertical video featuring five famous crab restaurants in Boston.

Organizing your channel

Part of a successful channel strategy is paying attention to how your channel looks and feels when someone comes to your YouTube channel. Think of your videos as collections that tell a cohesive story that your viewers know how to navigate. Consider how your channel will look and feel to viewers when they land on your channel. If you only have one video in 100 different categories, they will not know how to use and engage with your channel. If, instead, you have ten playlists that are organized into sections on your channel, they will clearly know how to interact and view your channel. As a reminder, a *playlist* is a group of videos that you have curated for your viewer. It allows you to tell the viewer what order they should view your content in, and what videos go well together.

TIP

A good example of channel content organization is Yoga with Adriene (`www.youtube.com/user/yogawithadriene`, 12M+ subscribers). She has curated her content and sections to her different audiences. When you land on her channel, you clearly see sections organized into things like "Yoga for Beginners," "Morning Yoga," and "Yoga for Back Pain." Each playlist and section has ten or so videos for viewers.

It is important to think of these types of themes when curating your content strategy, so that your audience has enough content to engage with when they visit your channel.

To maximize your organization, consider creating a playlist and some sections, both explained next.

Create a playlist

To organize your videos by creating a playlist, follow these steps:

1. **Log in to your YouTube account.**
2. **Click the Channel icon in the top-right corner of the YouTube homepage and choose YouTube Studio from the menu that appears.**
3. **Select Content on the left side of the navigation.**
4. **Choose the Playlist tab on the top navigation.**
5. **Click the New Playlist button.**
6. **A popup will ask you to name your playlist, as shown in Figure 9-2.**

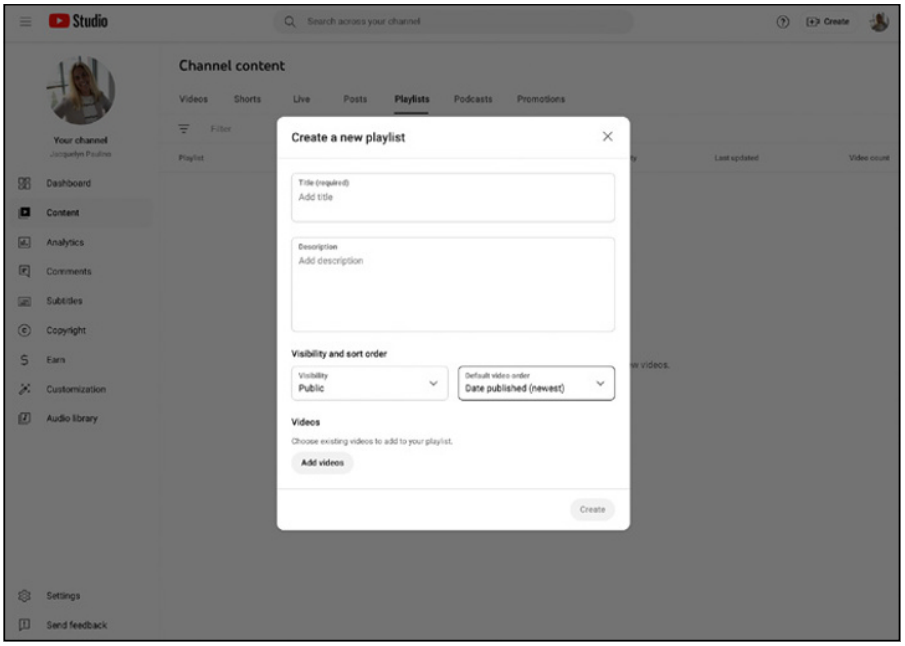

FIGURE 9-2: Creating a playlist helps organize your videos.

This is important, as it shows the theme of the videos in your playlist. You can also provide a playlist description to include more information about the collection of videos. This is helpful for your viewers as well as for the YouTube algorithm.

7. **Click the gray button to Add Videos to your playlist.**
8. **When you are finished editing the playlist title and description and you're done adding videos, click the Create button.**

Create sections

Sections show up on your YouTube channel when viewers go to your channel homepage. Sections are typically dedicated to content types or a series of videos on your channel. Sections can be used to help organize your content for viewers and help them find your content more easily.

To create sections, first create your playlists, then follow these steps:

1. **Log in to your YouTube account.**
2. **Click the Channel icon in the top-right corner of the YouTube homepage and choose Your Channel from the menu that appears.**
3. **On the left side, choose Customize Channel.**
4. **Stay on the first tab, titled Layout.**

   You'll see the screen shown in Figure 9-3.

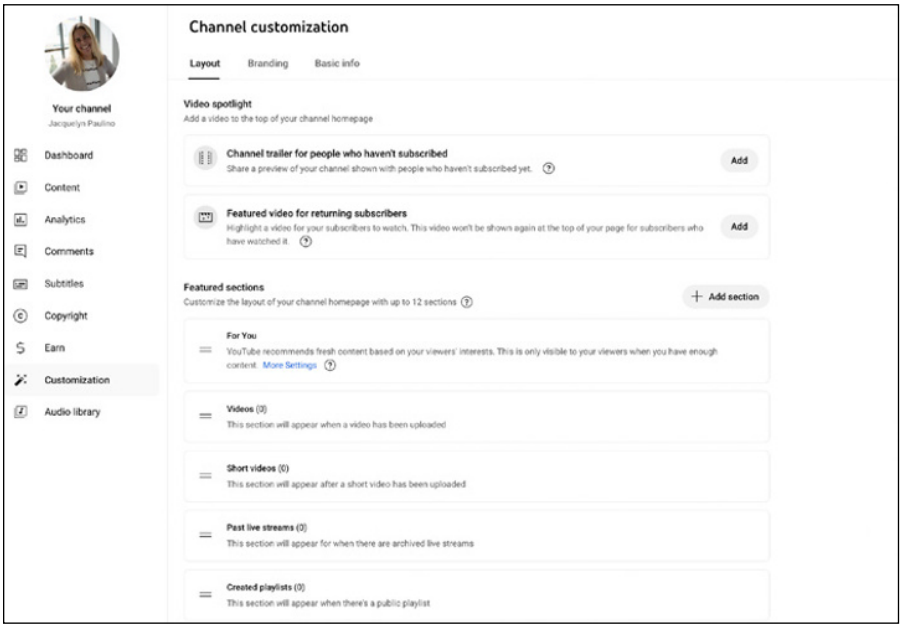

FIGURE 9-3: Organizing your sections.

5. **Choose Add Section.**
6. **You have multiple choices for your sections on your channel. Your choices are as follows:**
    - For You
    - Videos
    - Popular Videos
    - Live Now
    - Past Livestreams
    - Upcoming Livestreams
    - Single Playlist
    - Created Playlists
    - Multiple Playlists
    - Subscriptions
    - Featured Channels
    - Top Community Clips

    You can choose which option is best for you and your channel, but here are a few suggestions:

    - **For You** allows YouTube to customize what your viewers see based on the viewing habits of the viewer and what they have already seen on your channel.
    - **Single Playlist** shows you a popup to choose which playlist you want to show on your YouTube channel section. This gives you the most control over the organization of your channel.
    - **Popular Videos** is also a good choice. This automatically shows a playlist of your most popular videos based on views.
7. **After you choose the sections you want, click Publish on the upper-right side of your screen.**

Deciding on video length

To decide the best video length strategy, you need to go back to your channel's "North Star." What type of channel do you want to create? If you are building a documentary style educational channel, your videos may need to be longer. If you are creating a children's nursery rhyme channel, your videos may need to be shorter. Even so, there are some best practices to keep in mind. You want to

have people watch as much content as possible on your channel, and the longer the video. . .the longer the watch time. But, you don't want to make videos that are long for the sake of being long because you will lose your audience.

TIP

As a rule of thumb (always dependent on channel type, however), the sweet spot for an average YouTube video is 7–10 minutes.

Developing a long-form content strategy

Long-form content on YouTube generally refers to videos that are longer than ten minutes. These videos can include any of the video types mentioned in this chapter, but they often take the form of in-depth tutorials, vlogs, films, and documentaries. Developing a long-form content strategy can boost watch time on your channel and enhance discoverability. As you can see in the content calendars described earlier in this chapter, the example creators strategically varied the lengths of their videos to suit different types of content.

Many channels center their content strategy on a longer-form due to the nature of their channel topic. Take, *Architectural Digest* for example, at `www.youtube.com/@Archdigest/`. Their videos, which often explore famous people's homes in detail, typically exceed ten minutes. This in-depth approach allows them to showcase architectural details of each home and include unique personal stories throughout.

REMEMBER

Longer-form videos can take more time to produce and may be more expensive as well. Keep this in mind as you plan your content calendar and strategy, and consider balancing these higher-cost, time-intensive videos with shorter, easier-to-produce ones.

Longer-form content is more likely to be viewed on desktop or television screens. Remember to create engaging content that someone will be excited to watch in this more lean-back experience. YouTube users now expect high-quality video, especially with longer-form content. Remember to use your best practices from video production when creating your long-form content strategy. (See Chapters 4 through 6 for video production tips.)

Developing a short-form content strategy

Shorter-form videos (less than ten minutes) are an important part of any YouTube channel strategy. YouTube also has created a mobile-first video format that is made for videos less than one minute, YouTube Shorts. These vertical videos are made for Mobile viewing and must be three minutes or less. Even channels that focus on longer form content, like *Architectural Digest*, have adopted YouTube Shorts as a must-have video format.

Shorter videos and YouTube Shorts are an important way to engage viewers who may not have time for a video over ten minutes. Keep in mind that people prefer different video lengths depending on factors like time of day, the device they are viewing on, or the type of content they are interested in. Incorporating a variety of video lengths gives your audience more flexibility in how they consume your content.

Architectural Digest for example, creates short snippets of their long-form content and turns them into YouTube Shorts with titles like "Gwyneth Paltrow's Plates are Too Cute to Stack" and "Benny Blanco Might Have the Comfiest Sofa Ever." These videos are clearly short-form videos compared to their full house tour videos.

Incorporating YouTube Shorts

Shorts have become an important part of many YouTube creators content strategy, and they even live within their own tab on your YouTube channel. Figure 9-4 shows how Babish Culinary Universe (`www.youtube.com/@babishculinaryuniverse/shorts`), which has earned over 10M YouTube subscribers, uses Shorts.

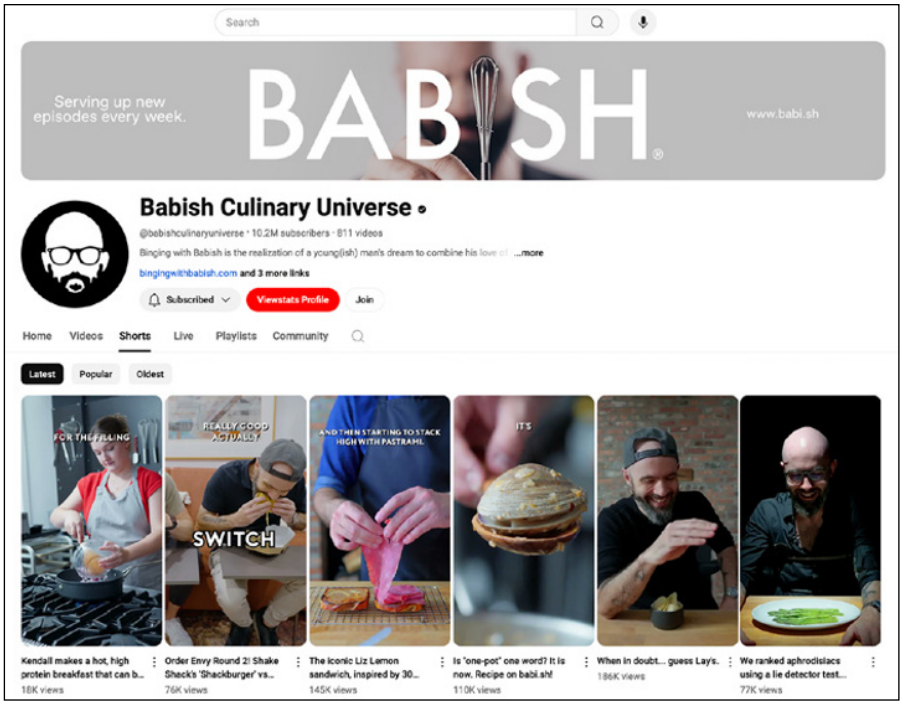

FIGURE 9-4: The Babish Culinary Universe Shorts page.

Shorts videos are typically viewed in a feed (one right after the other), as people swipe video to video on their mobile device. Make sure your videos are engaging right away and focus on keeping people's attention in the first five seconds. Shorts should be easier and cheaper to produce, so use this format to experiment. Viewers do not have the same expectations of quality with YouTube Shorts as they do with longer videos. This means that you can whip out your smart phone and start shooting today. (See Chapter 14 for AI editing tools specifically tailored to YouTube Shorts.)

CONTENT YOU SHOULD AVOID

Before you upload anything to YouTube, it's a good idea to familiarize yourself with the kinds of things you can't upload to the site. YouTube disallows several types of content, and uploading content that violates these guidelines can get you in trouble. You can even lose your account.

WARNING

YouTube reserves the right to remove any video at any time, but these types of videos are explicitly banned and will get you in trouble with the YouTube authorities:

- Pornography
- Illegal behavior (including drug abuse, underage drinking or smoking, animal abuse, and bomb-making)
- Gratuitous violence
- Hate speech (videos that demean a group based on race, ethnic origin, disability, gender, age, or sexual orientation)
- Threats or harassment
- Spam (videos with misleading titles, descriptions, thumbnails, or other metadata)
- Copyrighted material
- Private information
- Impersonating others
- Exploitation of minors (bullying, harassing, sexualizing, exploiting, misleading, or attempting to harm children)

See Chapter 3 for more information about forbidden content and Chapter 13 for guidelines about what you can and can't show children (under 13 years of age).

IN THIS CHAPTER

- Improving channel performance with YouTube Studio's Channel Analytics
- Gaining deeper community insights to keep your audience engaged
- Diagnosing and evaluating channel, video, and audience issues

Chapter 10
YouTube Studio Channel Analytics

Imagine driving along in your car and suddenly your dashboard goes out: no lights, no gauges, no navigation. You can either pull over to the side of the road and call a tow truck or just keep driving. Whatever the decision, you'll have a tougher time making it to your destination. As a YouTube creator driving down the video highway, you need a dashboard, too: That dashboard is YouTube Studio's *Channel Analytics* (also often just called *YouTube Analytics*).

The Channel Analytics feature is designed to help you uncover meaningful information about your audience, viewership, and engagement. If you're partnering with other YouTube creators and brands for sponsorships, chances are good that you'll be prompted to provide some interesting reports about all the wonderful things happening with your YouTube channel. In some cases, though, you may have to deliver some not-so-good news: Maybe your audience and fan base just aren't liking the new videos being uploaded to the channel. Channel Analytics is there to help you figure out what may have gone wrong — and a whole lot more.

Channel Analytics is also where you find the details about your audience: where they're finding you, what they like, where they're watching, and so on. After a while, Channel Analytics will likely be your first YouTube stop every day. Spend time mastering the analytics process and extracting the key insights it contains,

because it will help you craft a more robust channel — and significantly better video content. If you're making money from your channel, Channel Analytics can help you earn even more.

REMEMBER

Channel Analytics isn't just for new channels. If you already have a channel and it's not performing to your satisfaction, Channel Analytics is a valuable resource for diagnosing and subsequently fixing problems.

Getting Started with YouTube Studio's Channel Analytics

It's tough to talk about analytics with YouTubers without hearing supporting terms like *metrics* and *insights.* Don't be put off by all the geeky terms. In Chapter 8, you find out all about setting goals for your channel. This chapter, however, is all about determining whether you're meeting your goals; to be able to do that, you need to work with metrics and insights.

Here's the skinny: Metrics are *quantitative* measurements, such as the number of views and the click-through rates on your channel. Metrics gauge your goal attainment against your plan. Insights are *qualitative* and *actionable* things you learn and do from analyzing metrics — determining whether your content is working for you, for example, or figuring out whether your interactive cards are well placed in your video.

Channel Analytics shows you how you're tracking against your goals and also where you may need to make adjustments. Understanding metrics and insights is relatively straightforward, but you need to know where to look in Channel Analytics to get the data you need.

REMEMBER

As a content creator, always think in terms of metrics and insights. You must *act* on those insights, though. For example, if the view count and number of likes (metrics) for your new video are only 25 percent of your target, your video may not be resonating with your audience or maybe you released it at the wrong time (insights). Take the time to fix what may be immediately wrong (such as poor metadata), or change future content or programming. You should monitor the video metrics again over time.

As you become more sophisticated in your use of Channel Analytics, you realize that certain metrics may depend on other metrics. For example, your earnings metrics may be impacted by view metrics, which may be impacted by engagement metrics. Don't sweat the details — the relationship among all metrics comes together quickly.

Reading Channel Analytics reports

Your go-to place for all aspects of YouTube Channel Analytics is the Channel Analytics section of YouTube Studio. To make your way there, do the following:

1. **In your web browser, go to `www.youtube.com`.**
2. **Log in to your YouTube account.**

   If you see a blue Sign In button in the top-right corner of the YouTube homepage, enter your email address and password.
3. **Click the Logged-In icon and choose YouTube Studio from the menu that appears.**

   The YouTube Studio navigation menu will appear on the left side of your browser.
4. **Choose Analytics from the navigation menu.**

   By default, you should go directly to the Overview tab, as shown in Figure 10-1.

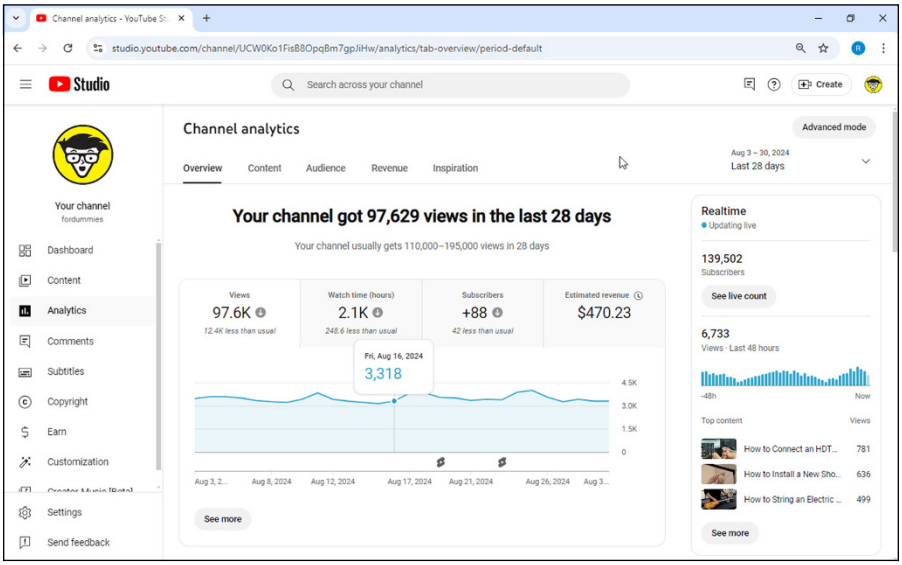

FIGURE 10-1: YouTube Channel Analytics overview.

TIP

You can also bypass these report-reading steps by going to `www.youtube.com/analytics`.

Channel Analytics is divided into five subsections, indicated by the five tabs running across the top of the screen. They're described, from left to right, in the following sections.

The Overview tab

This tab presents a high-level view of your channel's overall performance. It includes the following summary reports:

- **Main graph:** Data on views, watch time, and subscribers over a specified period. If your channel is monetized, you also see estimated revenue data in this graph.
- **Your top content in this period:** A list of your top ten videos for the selected period, ranked by views.
- **Realtime:** Displays your current subscriber count as well as video views and top viewed videos over the last 48 hours.
- **Latest content:** Shows an embedded video of the latest videos you have uploaded, as well as views, impression click-through rates, and average view durations.

The Content tab

This section of the Channel Analytics overview page provides insights into how your content is performing and shows the traffic sources your audience uses to find your content. By default, this page shows data for Shorts content, but it can be configured for regular videos, livestreams, or both. You can also select playlists to see your playlist performance.

When Shorts is selected in the Content tab, the following reports are available:

- **Main graph:** Typically, this graph displays the number of views that your content has generated over time, with other helpful metrics relevant to Shorts or regular videos.
- **How viewers find your Shorts/videos:** Displays which traffic sources lead to the most views on your channel. This can include things like YouTube search, suggested videos, the Shorts feed, and more.
- **How many chose to view (Shorts only):** Shows the percentage of people who saw your Shorts content and decided to view it compared with those who swiped away.
- **Top Shorts/videos:** Shows the most watched Shorts or videos on your channel over the last 28 days.
- **Top remixed:** Shows your top content used to create Shorts over the last 28 days.

When Videos is selected in the Content tab, the Key Moments for Audience Retention report is available. This data table and visualization shows key moments for audience retention. You can look at the video intros, top moments, spikes, or dips to see insights on average percentage viewed.

TIP

A list of videos shows the average view percentage per video, which is basically how much of the video your viewers stay to watch. For a 60-second video, if viewers stay on average to watch 30 seconds, that is an average view percentage of 50. To the right of this report is a visualization that shows the average view percentage over time for the video selected in the video list on the left.

When All is selected in the Content tab of the Channel Analytics overview page, the following reports are available:

- **New viewers:** This report shows viewers who discovered your channel for the first time in this date range. Data is broken out by videos, Shorts, and livestreams.
- **Returning viewers:** This report shows viewers who watched more than one video. Data is broken out by videos, Shorts, and livestreams.
- **Subscribers:** The number of subscribers gained or lost (net) during this date range. Data is broken out by videos, Shorts, and livestreams.
- **Views:** The total number of views. Data is broken out by videos, Shorts, and livestreams.
- **Published content:** The number of videos published for the selected content and date range worldwide.
- **Impressions and how they led to watch time:** This funnel depicts how many times a thumbnail was shown to viewers on YouTube (impressions), how frequently those thumbnails resulted in a view (click-through rate), and how those views ultimately led to watch time.
- **Viewers across formats:** Here you can see a visualization as well as the data depicting the percentage of your viewers who watch videos only, Shorts only, or both.
- **How viewers found you:** This is a pie chart and table of data showing the traffic sources of your views.

Finally, when Playlists is selected in the Content tab, the Playlists report is available. It shows your top playlists sorted by Views from Playlist.

The Audience tab

This section describes who is watching your channel. It contains these summary reports:

- **Main graph:** Displays the number of returning viewers, unique viewers, and subscriber growth over a specified period.
- **Videos growing your audience:** Shows the videos that new viewers watched before returning to your channel to watch more content over a 90 day period.
- **Channels your audience watches:** Shows other channels that your audience also watches, to give you an idea of their tastes. This is based on their watch behavior over the last 28 days.
- **What your audience watches:** Shows the videos from other channels that your audience recently watched, based on data from the last seven days.
- **Formats your viewers watch on YouTube:** Displays the popularity of different types of video formats, such as long-form content, short-form content, or livestream content, that your audience prefers to watch.
- **When your viewers are on YouTube:** Shows the times of day and days of the week your viewers watch YouTube so that you can determine when to publish your videos or launch a livestream.
- **Subscriber bell notifications:** Shows the percentage of your audience that has turned on all notifications for your channel. Also displays a typical channel benchmark range for this action on other YouTube channels.
- **Top geographies:** Shows the countries where your audience lives based on activity over the last 28 days, ranked by popularity.
- **Watch time from subscribers:** Shows how much watch time on your channel is attributed to subscribers compared to people who have not yet subscribed.
- **Top subtitle/CC languages:** Displays your audience's use of subtitles as well as which languages are most frequently being used based on a percentage of views.
- **Age and gender:** Provides a breakdown of your audience by gender and age bracket based on a percentage of views.

REMEMBER

YouTube reports demographics data for users who are signed in to Google. Because of this, the data you see may not reflect all traffic visiting your channel.

The Revenue tab

This section displays a summary of earnings from your channel. It includes these summary reports:

- **Main graph:** Shows your estimated revenue over time and can be segmented by different revenue streams, such as ads, supers (if you livestream), and sales from the affiliate program.
- **How much you're earning:** Displays your estimated revenue for the past six months.
- **Content performance:** Shows you which of your videos are generating the most money and how much money they have earned over the last 28 days.
- **How you make money:** Provides a breakdown of where your channel revenue is coming from, from sources like advertisements and YouTube Premium.

REMEMBER

The Revenue tab is accessible only to YouTube creators who have been accepted into the YouTube Partner Program. (Chapter 13 has more on the YPP program.)

The Inspiration tab

This is a new tab that uses AI to help you generate new ideas for your next video. It allows you to search for different topics and determine how interested your audience might be in a given idea. This tab also provides examples of similar types of content that people are searching for and watching. As AI continues to evolve, this tab will likely become even more useful.

TIP

If you want to see deeper analytics on any summary report described in the preceding sections, you can click the See More link at the bottom of any graph to open Advanced Mode, which provides access to additional metrics. Similarly, you can launch Advanced Mode by clicking the Advanced Mode link above the Date drop-down menu in the upper-right corner of the page at any time to see more granular reporting details. In the next section, we discuss how to use features within the Advanced Mode window.

To learn more about the main reporting tabs of Channel Analytics as well as the summary reports just described, visit `https://support.google.com/youtube/answer/9002587`.

Breaking down the report components

Beyond the summary reports available within the main pages of Channel Analytics, YouTube provides a richer set of reporting options within Advanced Mode that may seem overwhelming at first. You quickly discover, however, that navigating this comprehensive reporting module is quite easy because it consists of these four distinct sections:

- **Filters:** Over time, you do a lot of different things with your channel, including adding video content, constructing playlists, engaging subscribers, and so much more. You'll definitely want to set up dynamic filters that are meant to show you only the information associated with each of these aspects of your channel. The Advanced Mode filter section lets you do that.
- **Reports:** Advanced Mode reports provide greater detail than the summary reports that are available on the main pages of Channel Analytics. You can also access some reports that aren't available on the main Channel Analytics pages and add metrics to all reports. You can access this feature from the menu beneath the filters and above the chart within Advanced Mode, or by clicking the See More link at the bottom of any summary report.
- **Charts:** After you've determined which report you want to analyze, you can get lots of information with some fairly flexible graphical representations (charts, in other words) to guide your understanding. This helps you assess the performance of your channel, your content, and your community. (Figure 10-2 shows a Channel Analytics chart of views over several weeks.)
- **Tables:** Shows itemized details that correspond to the particular Channel Analytics report. For example, in the Videos report, you can create a detailed, organized list of your top 50 videos, including name, views, percentage growth in view, estimated minutes watched, and average view duration. The bottom of Figure 10-2 shows how the table of a Channel Analytics report might look.

Grouping information

To simplify some of your channel analysis, you can create custom groups of videos or playlists. For instance, if you manage a baking channel, you may want to create one group for all your bread videos and playlists and another for your cake baking videos and playlists. To create a group, simply follow these instructions:

1. **With the Advanced Mode window open, click on your channel name within the top-left search input field.**
2. **Choose Groups from the pop-up menu that appears.**

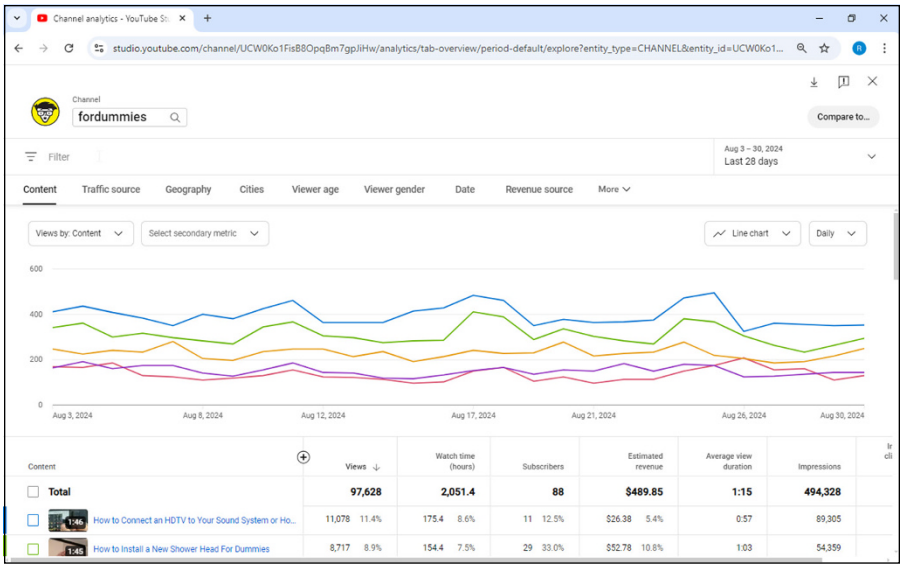

FIGURE 10-2: A look at the Advanced Mode page of Channel Analytics.

3. **Then choose the Create a Group option from the Groups menu.**

   Doing so opens a new window from which you can select videos to add to your group.

4. **Give the group a name, select the videos you want in the group, and then click Save.**

REMEMBER

A *group* is used for your analysis work; it lets you aggregate related content. It's different from a playlist, which is meant for audience viewing.

Comparing data

In the earlier (hypothetical) example of a baking channel, wouldn't it be great if you could compare how your bread-baking videos are performing against your cake-baking videos? Well, with Channel Analytics, you can do precisely that. (You can even make comparisons by country and date.) To compare videos or groups, click the Compare To link at the top right of the Advanced Mode window (above the date picker) and enter the names of the items you want to compare. Channel Analytics pulls the data together for you and presents it side by side.

TIP

If you're running a YouTube advertising campaign (see Chapter 12), groups and comparisons are effective ways to determine which channel videos may be the best ones to advertise.

Setting up report filters

Creating truly informational reports is easy: Just figure out which data you want to include and which data you don't. The filter section not only makes this task possible but also lets you see the results of what you're doing *immediately*, which lets you fine-tune the filter so that the data is exactly what you want.

By using the following text fields and dropdown menus found in the filter section, you can ensure that you're looking at only the data you need:

- **Search for Content field:** Located at the top left of the Advanced Mode window next to your Channel icon, this field allows you to select only a specific video, playlist, or group for analysis.

  TIP

  If you want to include more than one video, group the videos first. This feature doesn't let you filter for multiple individual videos unless they're part of a group or playlist.

- **Selectable dropdown filters:** Located beneath the Search for Content field is an upside down triangle next to the word "Filter". Clicking the upside down triangle launches a dropdown menu of selectable filters, including:
  - *Ads Enabled:* You can show only videos with ads enabled or ads disabled.
  - *Audio Only Playback:* You can select from audio only playback: true or audio only playback: false.
  - *Content Type:* You can isolate the data to only focus on videos, Shorts, or livestreams.
  - *Device Type:* You can isolate video data that is gathered by computer, TV, mobile phone, or tablet devices to determine what types of electronic devices your audience likes to use.
  - *Geography:* You can select specific countries to analyze the behaviors of your audience around the world.
  - *Live/Replay:* If you livestream on your channel, you can use this filter to see what percentage of your content is consumed during your broadcasts compared to content that's accessed on demand.
  - *Operating System:* You can identify which operating system your audience uses most commonly when watching your content.
  - *Player Type:* You can select where your videos are viewed either from YouTube main, YouTube standard embedded player, YouTube Player for Publishers, or YouTube Player for Education.
  - *Post Type:* You can show performance of your community posts by test, poll, video, image, playlist, or quiz.

- *Premiered:* You can break down video performance by selecting videos that utilized the Premiere feature or videos that did not Premiere.
- *Product Activity:* You can see performance of your linked products based on connected stores, commission programs, and affiliate products.
- *Publish Date:* You can look at video performance based on the publish date. Select a range or a specific date to see the data.
- *Revenue Source:* You can isolate your data based on where your revenue comes from. The list of revenue sources continues to grow but the most common sources are Watch Page ads, YouTube Premium, and Shorts feed ads.
- *Subscription Status:* You can choose to only see performance for viewers who have subscribed to your channel or are not yet subscribers. This can help you see what type of content your subscribers enjoy most.
- *Traffic Source:* You can filter your data down to a specific traffic source to take a closer look at how different sources perform.
- *Transaction Type:* You can select what type of performance transaction you want to view.
- *Translation Use:* You can select video data by whether your audience translated it or watched it in the original language.
- *YouTube Product:* You can separate your video data by YouTube, YouTube Kids, YouTube Music, YouTube Gaming, and YouTube TV products.

REMEMBER

Not all filters work for all data sets. Any filters that are not available for the particular analysis you are trying to perform will be grayed out. For example, when looking at age range data, you cannot filter by revenue source. Many of these filters can be used simultaneously, however, which can help you analyze very specific segments of your audience and gain a better understanding of how to reach your goals.

- **Date dropdown menu:** The default value is Last 28 Days. Click the dropdown menu beneath the Compare To link to choose common date criteria, such as this year, last year, or this month. If a preconfigured date doesn't work, you can pick a more suitable range by choosing the Custom option at the bottom of the menu.
- **Compare To:** Clicking the Compare To link divides the Advanced Mode window into two and brings up a second filter section immediately across from the first. (YouTube allows only two comparisons.) When you're finished with the analysis, merely click the Cancel Comparison button that appears near the top right of the window.

TIP

You need to set up a filter only once in the Advanced Mode section of Channel Analytics. You can move among all report types, and your filters will remain in place.

Selecting a report

Beneath the Filters section and above the Chart section, you find a variety of pre-configured Advanced Mode reports that you can select to gain valuable insights about your channel. Many of these reports should look familiar to you from the summary reports available on the main reporting tabs of Channel Analytics (which we describe in detail in the earlier section "Reading Channel Analytics reports").

Figure 10-3 shows the Reports menu within Advanced Mode. If you haven't already selected a report to analyze, choose one from the menu to gain a greater understanding of your audience and how they're interacting with your channel. We help you take a deeper dive into how to utilize some of the most meaningful reports a little later on in this chapter.

FIGURE 10-3: The Reports menu within Advanced Mode.

Understanding visual charts

Moving from report to report, you're sure to see both the graphs and the data changing in the Chart section below the report menu and filters. Though many reports appear similar, each has specific metrics based on the report type. For example, you'll find likes and dislikes in a Content report, but such items would make no sense in a Traffic Source report.

REMEMBER

Channel Analytics always presents data relevant to the particular report type.

In the Chart section, you generally see the following elements:

- **Primary and secondary metrics:** A dropdown menu on the left side of the screen (right below the Reports menu) indicates the commonly associated

metrics for a particular report. Clicking on one of these metrics immediately graphs it on the chart. You can also select a secondary metric if you want to compare two different metrics at the same time. Charting different metrics against one another can provide insight into what channel actions influence another. For example, on a Content report, you may find that charting views and CPM show similar and aligned graphs. You can use this information to formulate the actions needed to drive views and accelerate earnings.

TIP

To add metrics to a chart, choose More Metrics from the dropdown menu. A complete list of available metrics is shown in Figure 10-4.

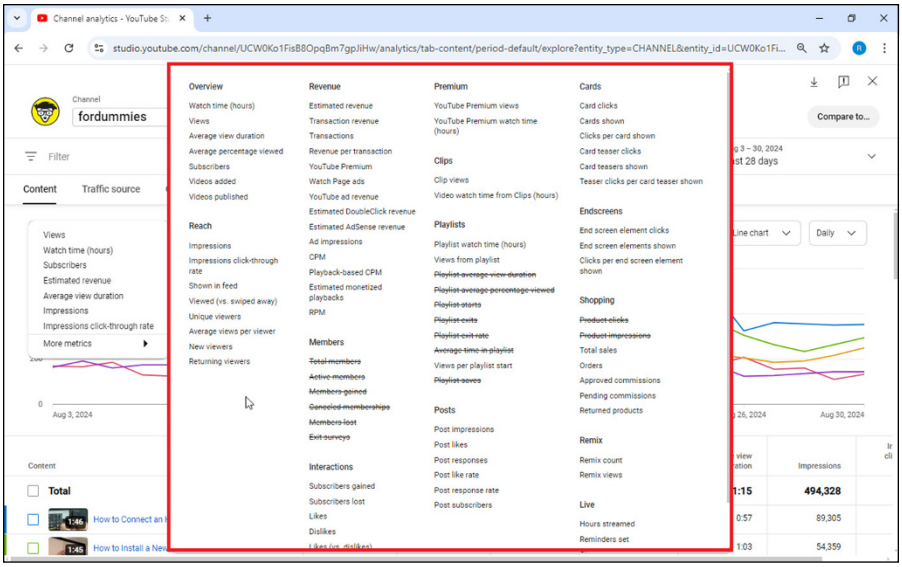

FIGURE 10-4: Metrics you can configure in Advanced Mode.

- **Chart type:** Near the top-right corner of the chart, you find the Chart Selection dropdown menu. Channel Analytics supports two chart types to analyze all preconfigured reports:
  - *Line:* Shows the primary metric and a secondary metric over a period that you select. This is effective for showing trends or viewing patterns over time. For a Video report, it may show total view counts for your channel over time. (Figure 10-5 shows a sample line chart.)
  - *Bar:* Illustrates relative proportions of a selected metric as bars, as shown in Figure 10-6. This type of chart is good for comparing things in aggregate, such as video views by age and gender.
- **Graphing controls:** You can find additional graphing controls on the drop-down menu to the right of the chart selector. For line charts, you can graph

using daily, weekly, monthly, or even yearly spans. Additionally, you can change what data is graphed by selecting the checkboxes in the table beneath the Chart section. By default, up to five results are graphed, depending on the report you have selected. You may choose up to 12 items to graph simultaneously from the table.

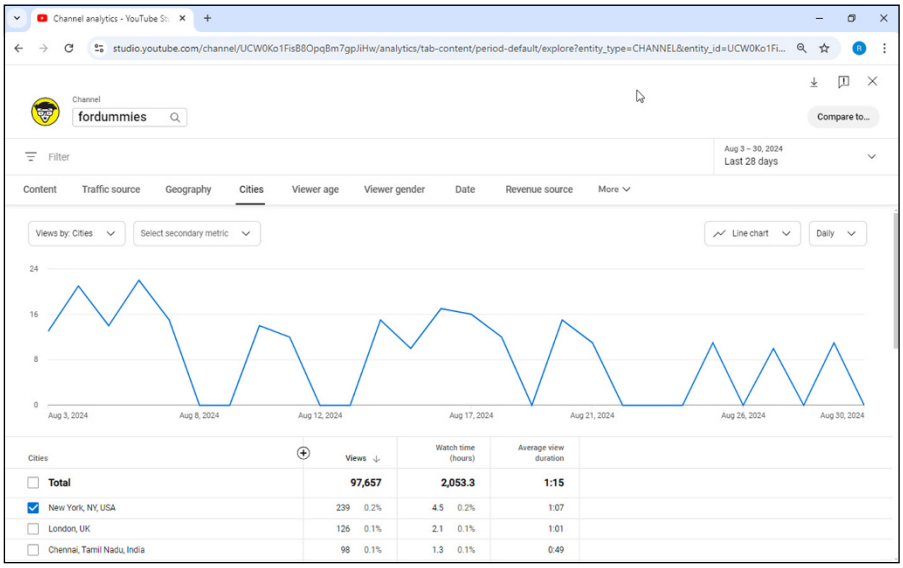

FIGURE 10-5: Sample line chart.

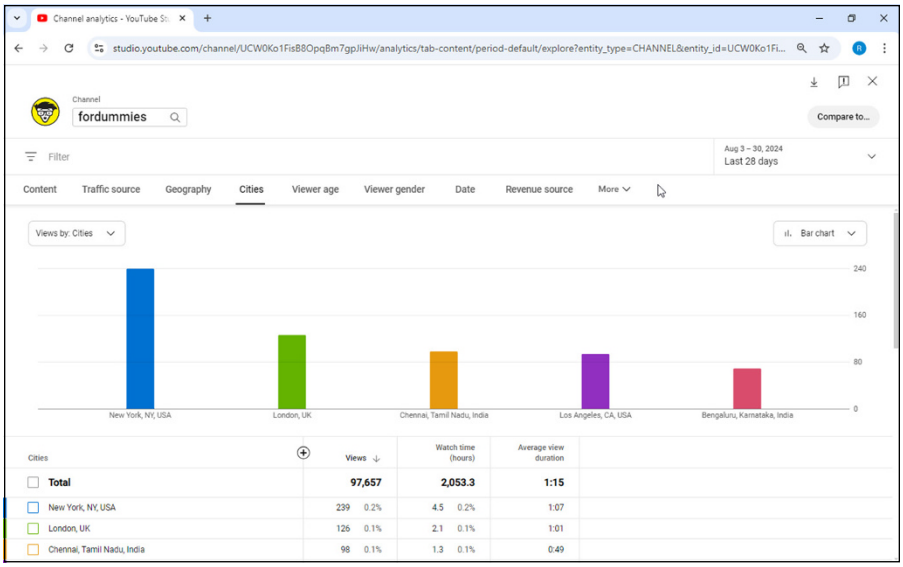

FIGURE 10-6: Sample bar chart.

Understanding the table section

Sometimes, it's easiest to digest data by looking at a grid of results. The Table section of Advanced Mode, located beneath the chart, provides corresponding details and metrics to help you better understand how your channel is performing. For each report, the table dynamically changes to display whatever information is the most relevant to help you with your analysis. For example, in the Content report, the table displays your top 50 videos along with common performance metrics such as impressions, views, and watch time. Moving over to the Viewer Age report, a different set of data is presented, such as the age ranges of your audience and their average view percentage when watching your videos.

Similarly to the chart, you can customize the table for a given report using additional metrics by clicking the black and white Plus (+) button located between the first and second columns. Remember, however, that not all reports support every metric.

TIP

Sometimes, you want to customize your charts or combine details of your Channel Analytics data with other information. You can either export your data directly into Google Sheets or export it first as a comma-separated values (CSV) file that you can then import into Microsoft Excel or another common spreadsheet program. To do this, just click the Export Current View button, represented by an arrow pointed toward the ground, in the top-right corner of the Advanced Mode window.

Learning about Video Views

Channel Analytics provides plenty of insights, but you still have to come up with the final answers. To be effective, put on your proverbial Sherlock Holmes hat and pick up a magnifying glass as you sift through all the YouTube metrics clues. To see how that might work, this section looks more closely at a specific report type: the Video report.

Seeing which content is the most popular

Like most YouTube content creators, you want to know which videos are attracting the most views. Accessing that info is simple:

1. **In your web browser, go to `www.youtube.com`.**
2. **Log in to your YouTube account.**

   If you see a blue Sign In button in the top-right corner of the YouTube homepage, enter your email address and password.

3. **Click the Logged-In icon and choose YouTube Studio from the menu that appears.**

   The YouTube Studio navigation menu will appear on the left side of the browser.

4. **Choose Analytics from the navigation menu.**

   By default, you should go directly to the Overview tab. (Refer to Figure 10-1.)

5. **Click the See More link at the bottom of the main graph in the Overview tab.**

   Doing so launches Advanced Mode and brings up a line chart that shows your channel views by video over the past 28 days. (***Note:*** You can change the analysis period by changing the time from the Filter section that sits above the chart.)

6. **Examine the lines in the chart.**

   Are they moving up and to the right? Do you see peaks during certain days? Look for patterns and look for spikes, both high and low.

TIP

   If you see consistent peaks, that means your audience is viewing your content regularly. Think about the programming tips from Chapter 4 and align your schedule with your audience's viewing patterns.

REMEMBER

You won't break anything by looking at a different chart type or changing the analysis timeframe. You should become comfortable navigating and modifying your analysis.

Determining whether viewers are watching or leaving

One of the truly great aspects of YouTube is the detail it can provide about how much of your videos your audiences actually watch. If you're thinking about the view duration, that's partially correct: If you have a four-minute video and viewers watch only about half of it, it has a two-minute (or 50 percent) view duration.

View duration, though important, tells only part of the story. A channel manager needs to know more, including the answers to these questions:

- Where is your audience dropping off?
- How does the audience attraction compare with similar videos?

Audience *retention* — determining the steps you need to take to hold on to your audience — should be a critical part of the analytics process because it increases

your overall watch time (another *key* metric we discuss later, in the "Making Sure Your Audience Is Engaged" section). Audience retention is a video-specific analytics report that allows channel managers to see these two factors:

- **Absolute audience retention:** You're greeted by a timeline that displays what percentage of your audience views your video. If you have a three-minute video, you see a retention graph for the entire three minutes aligned with the player for the entire video. You can see exactly where an audience watches and where they drop off.

  Don't become upset when you discover that your audience isn't watching 100 percent of your videos for their entire duration. Drop-offs are perfectly normal — think about your own viewing patterns on YouTube.

REMEMBER

- **Relative audience retention:** After you realize that you won't have 100 percent audience retention, you need to determine how your retention rates compare with similar content from other channels. You can use the relative retention rates displayed in the Audience Retention report to show how your video compares over time with other videos and to display whether parts are average, above average, or below average.

So, does an audience retention report sound intriguing? Here's how to carry one out:

1. **In your web browser, go to `www.youtube.com`.**
2. **Log in to your YouTube account.**

   When you see the blue Sign In button in the top-right corner of the YouTube homepage, enter your email address and password.
3. **Click the Logged-In icon and choose YouTube Studio from the menu that appears.**

   The YouTube Studio navigation menu will appear on the left side of your browser.
4. **Choose Analytics from the navigation menu.**
5. **In the overview section, scroll down to the summary report for your top content in this period.**

   You see a list of the top ten videos for your selected period, with the option to view more from the Advanced Mode window.
6. **Click on the name of a particular video you want to analyze.**

   Doing so directs you to a video-specific Channel Analytics page. The audience retention graph for this video is located underneath the main graph in the Overview tab. (See Figure 10-7.)

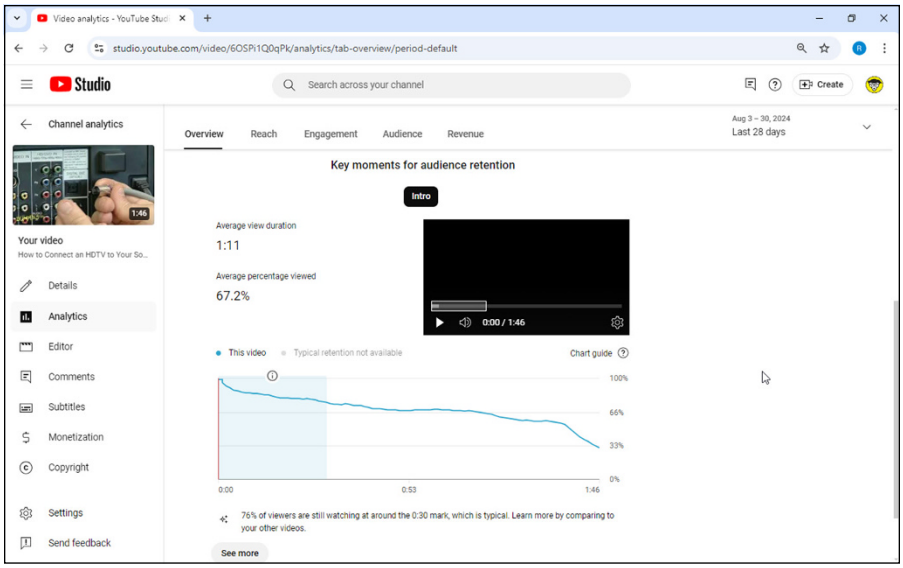

FIGURE 10-7: The Channel Analytics Overview tab.

TIP

If you don't see the video you want to analyze for retention within that top ten list on the Overview page, click on the Content tab from the left-side navigation menu and search for it within the Channel Content page. When you find the video you're looking for, hover the mouse cursor over the description and click the Analytics icon that appears to open the video-specific analytics page.

7. **Click the See More link in the audience retention graph to open Advanced Mode view.**

   This allows you to compare the audience retention graph more easily in relation to your video. When you click on any particular point in the graph, you automatically link to that point in the video above the graph.

8. **Search for peaks and valleys in the graph.**

   You may be scratching your head and trying to figure out why a peak is showing up on a viewing graph. Your audience may be choosing to *rewatch* a segment, signaling vital content. The valley represents viewer loss, so look at what's happening at that point in the video above the graph. The cause might be boring or overly long content, which is something that you should consider when editing upcoming content.

9. **Change the graph type to Relative Audience Retention by choosing the Compared to Other Videos option in the dropdown menu just above the graph (see Figure 10-8).**

   You should determine how your content is performing against comparable videos. If it's consistently below average, look at other content to understand in what ways it's different and why it may be more interesting to the audience than yours.

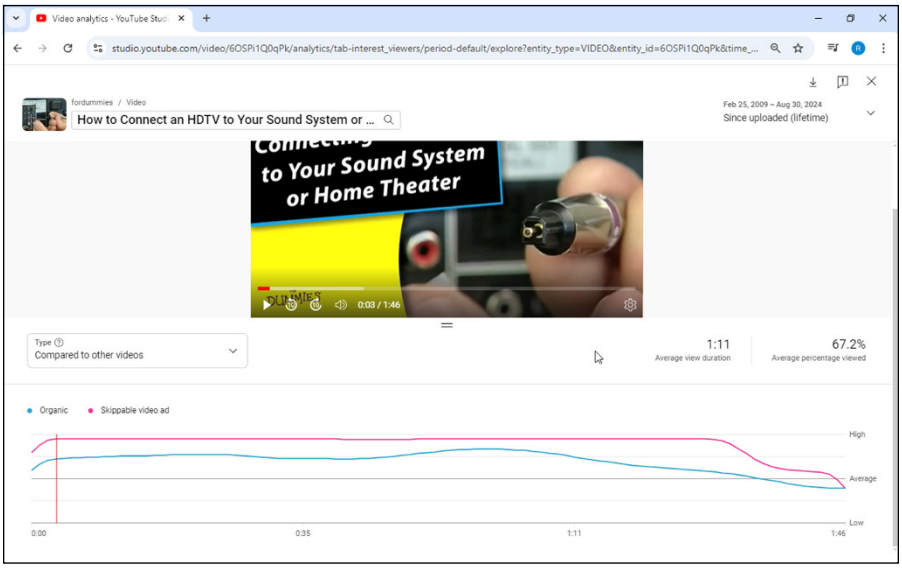

FIGURE 10-8: A Relative Audience Retention graph.

REMEMBER

The watch time plays a crucial role in increasing your video's discoverability in YouTube Search results. Audience retention provides you the insight you need in order to keep viewers watching and increase your watch time.

REMEMBER

A retention drop always occurs at the beginning of a video because that's when viewers decide whether they've chosen the right video to watch. However, if the drop seems rather precipitous at the beginning, it may be a sign that the title, metadata, or thumbnail is out of sync with what viewers expected when they found the video. Never mislead viewers and fix any concerns based on what your retention reports indicate.

Understanding Your Audience

Video reports and audience retention graphs are designed to help you understand how well your viewers are responding to your channel content. To find out who's watching your videos, you have to try a different tack: audience reports.

Diving into demographics

It helps to know who's watching your content so you can make important content-planning decisions. The Audience tab of Channel Analytics is a fascinating way to analyze your channel demographics, because you can get concrete information about your audience members' gender, age, and country of residence.

REMEMBER

Certain audience reports allow you to filter to see results explicitly from your subscriber base. Sometimes, it's interesting to see whether your subscriber demographics mirror your general audience demographics.

To access audience reports, follow these steps:

1. **In your web browser, go to `www.youtube.com`.**
2. **Log in to your YouTube account.**

   When you see the blue Sign In button in the top-right corner of the YouTube homepage, enter your email address and password.
3. **Click the Logged-In icon and choose YouTube Studio from the menu that appears.**

   The YouTube Studio navigation menu will appear on the left side of your browser.
4. **Choose Analytics from the navigation menu.**
5. **Click to open the Audience tab on the Reports menu.**

   Here you find summary reports of age and gender, as shown in Figure 10-9.

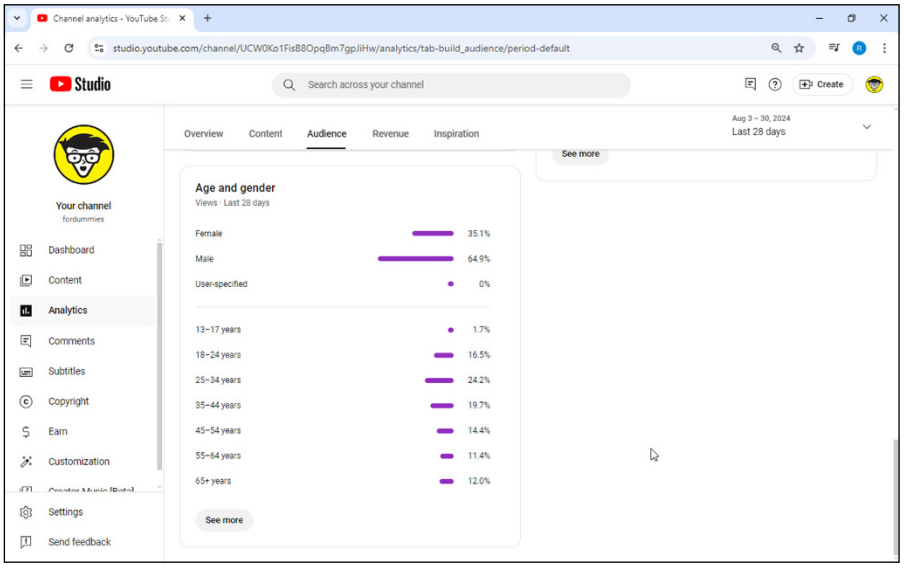

FIGURE 10-9: Channel Analytics age-and-gender report.

6. **Click the See More link at the bottom of the Age and Gender summary report and examine the charts and their accompanying details.**

   It's terrific if your audience is exactly what you thought it would be. If it isn't, revisit your assumptions. You may find that your content is having wider

interest, which may be a good thing. Conversely, if you're not seeing enough traction, perhaps you're not engaging enough with key creators and fans in your core demographic to help you get the word out.

7. **Refine the report to show only subscribed viewers by choosing Subscription Status from the filter dropdown menu.**

   Look closely at how the graphs change. If you see a big difference, determine whether subscription requests are working more broadly than expected, because your content certainly is appealing to others.

TIP

Make it a habit to compare your demographic information over time to detect any shifts in your audience.

Diving into subscribers

Knowing your subscribers' patterns and where they're doing their subscribing is an important part of your channel-management responsibilities. YouTube is well aware of that, which is why it offers a subscription source report as part of Channel Analytics. Here's how to access it:

1. **In your web browser, go to `www.youtube.com`.**
2. **Log in to your YouTube account.**

   When you see the blue Sign In button in the top-right corner of the YouTube homepage, enter your email address and password.

3. **Click the Logged-In icon and choose YouTube Studio from the menu that appears.**

   The YouTube Studio navigation menu will appear on the left side of your browser.

4. **Bring up the Analytics section of YouTube Studio.**
5. **Click on Advanced Mode from the top right of the screen.**
6. **Within the Advanced Mode window, click on More from the Reports menu and find the Subscription Source option.**
7. **Look at the report's Table section to see where on YouTube your audience subscribes to your channel.**

   In addition to subscriber gains, you see the number of subscribers lost, which is a normal part of channel activity. Figure 10-10 shows a typical subscription source report. If you click on the YouTube watch page from this list of subscription sources, you can see exactly which videos are bringing in the new subscribers.

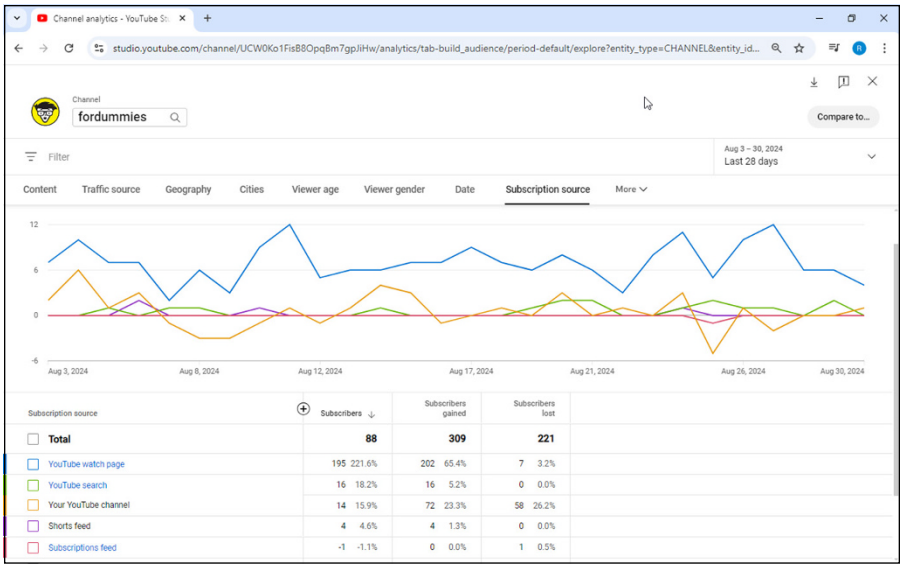

FIGURE 10-10: Subscription source report.

Optimizing Discoverability

YouTube is a huge place, and it's growing every day. Ideally, you want your content offered up first, but that takes some time. (Rome wasn't built in a day, you know.) As a content creator, you use analytics to figure out whether your quest for discoverability is moving in the right direction.

Seeing where viewers find your content

As your content becomes more popular and relevant for specific viewers, YouTube offers up your videos as Recommended videos and as part of its search results. These are important ingredients in your overall channel performance. So too is community engagement, which helps your content show up on playlists, websites, in social media, and more. Channel Analytics can help you determine where your audience is discovering your content.

The Traffic Sources report from Channel Analytics is designed to show you how viewers discover your content. It includes not only sources within YouTube but also external sites and social media. To see how your viewers find you, do the following:

1. **In your web browser, go to `www.youtube.com`.**
2. **Log in to your YouTube account.**

   When you see the blue Sign In button in the top-right corner of the YouTube homepage, enter your email address and password.

3. **Click on the Logged-In icon and choose YouTube Studio from the menu that appears.**

   The YouTube Studio navigation menu will appear on the left side of your browser.

4. **Bring up the Analytics section of YouTube Studio.**

5. **Click on Advanced Mode in the top right.**

6. **Within the Advanced Mode window, click on Traffic Source from the Reports menu.**

7. **Look at the report's Table section to see your top traffic sources (see Figure 10-11).**

   Sources here might include:

   - YouTube advertising
   - Channel pages
   - Browse features
   - Playlists
   - Playlist pages
   - YouTube Search
   - Suggested videos
   - Video cards and annotations
   - Direct or unknown — direct (mobile apps and external website)
   - External (website)
   - End screens
   - Shorts feeds
   - Sound pages
   - Hashtag pages
   - Product pages
   - Notifications
   - Other YouTube features (analytics, editing screen, and other random stuff)

8. **Click on a traffic source in the Table section.**

   Doing so brings up additional information about that traffic source category. For example, if you click Playlists, you see a detailed list of all playlists — yours and others — that include your videos. Or, if you click YouTube Search, you will see the top keywords that drive people to your channel. Consider working these keywords into your video descriptions and tags to optimize your discoverability.

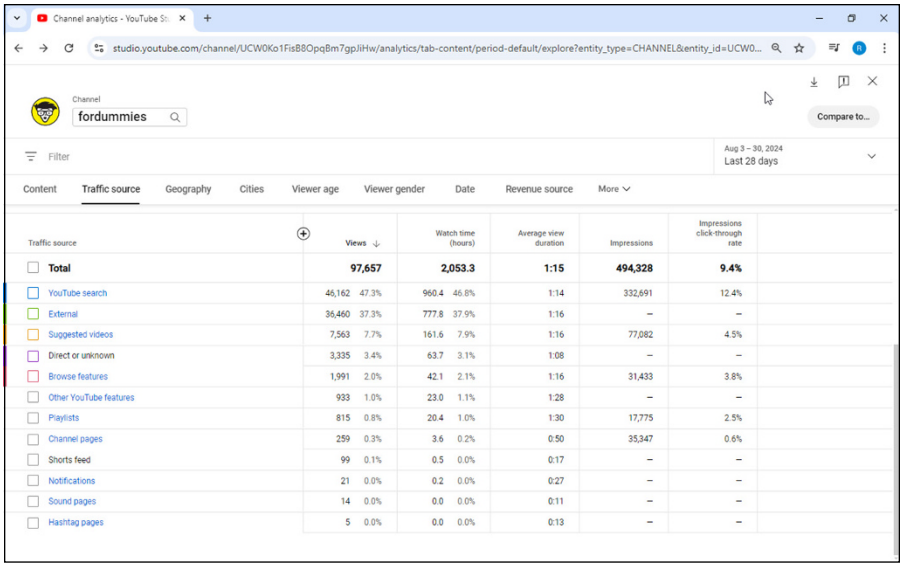

FIGURE 10-11: Viewing your YouTube channel traffic sources.

Finding out where (and how) viewers watch your content

Channel managers also need to know where their video content was watched and on what kind of devices, including computers and mobile devices. You can get that information with the help of two specific reports:

- **Playback location:** Shows whether the video was viewed from YouTube or from an external website or device
- **Device type:** Specifies the device format used to view video content

REMEMBER

Don't underestimate the importance of how your audience consumes your content. If mobile devices dominate, be sure that your videos don't require a 55-inch, 4K display to get your point across.

To determine where your audience is viewing, follow these steps:

1. **In your web browser, go to `www.youtube.com`.**
2. **Log in to your YouTube account.**

   When you see the blue Sign In button in the top-right corner of the YouTube homepage, enter your email address and password.
3. **Click on the Logged-In icon and choose YouTube Studio from the menu that appears.**

   The YouTube Studio navigation menu will appear on the left side of your browser.
4. **Bring up the Analytics section of YouTube Studio.**
5. **Click the Advanced Mode link at the top right of the screen.**
6. **Within the Advanced Mode window, click on More from the Reports menu and find the Playback Location option.**
7. **Click the Embedded in External Websites and Apps link in the Table section.**

   The report highlighting embedded players appears, as shown in Figure 10-12. YouTube allows websites to embed your video, which is one of the highest forms of engagement.

REMEMBER

   You always get full view credit for embedded videos. If you have a website, feel free to embed videos from your YouTube community and your subscribers as well. It's good practice because it highlights how you interact with your subscribers.
8. **To probe a bit deeper, go back to the Reports menu dropdown and click on the Device Type report.**

   Under the graph, you can toggle between the device types listed here:

   - Computer
   - Mobile phone
   - Tablet
   - TV

Understanding on which devices your audience watches your content can help you develop better content for your audience's viewing experience. For example, if you see that a majority of your audience watches your videos on mobile phones, you shouldn't use small text.

GOOGLE ANALYTICS AND YOUTUBE

If you're setting up a YouTube channel, chances are good that you have a website. And if you have a website, you're likely to have one or more analytics packages integrated into it, including the most popular one: Google Analytics. The good news here is that you can use Google Analytics for your YouTube channel.

Rather than use your existing Google Analytics tracking ID, create a new property only for your YouTube channel under your existing Google Analytics account. This new tracking ID must then be added to YouTube Studio's Advanced Channel Settings page. After the new tracking ID is in place, you can follow many of the interactions that visitors are specifically having on your YouTube channel page rather than on your watch pages or playlists. Google Analytics helps show you what Channel Analytics doesn't: how viewers discover your *channel*. Remember that Channel Analytics shows only how viewers are discovering your content, not your channel as such. With Google Analytics, you can figure out which videos drive the most viewers to your channel.

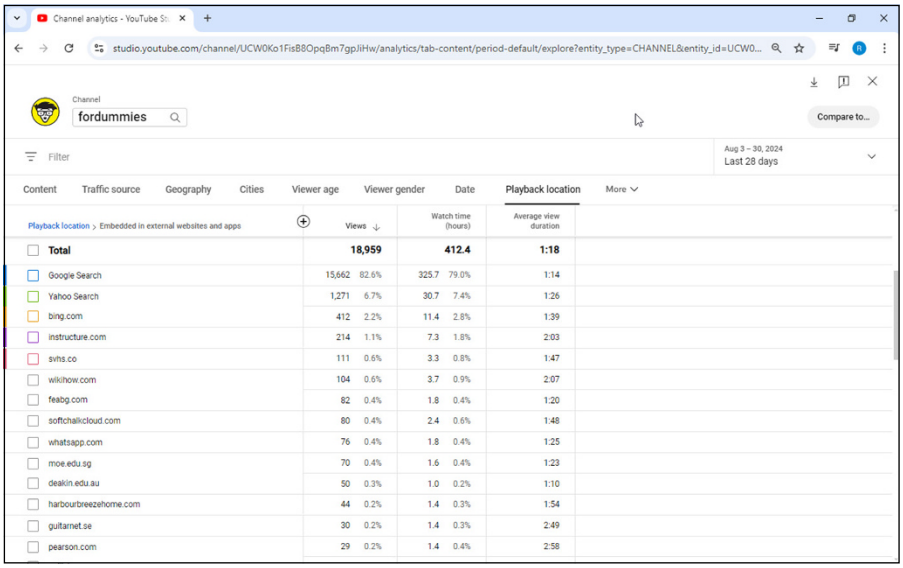

FIGURE 10-12: Reporting your embedded-player locations.

Making Sure Your Audience Is Engaged

Engagement is all about your viewers going beyond just watching a video. You want them to comment, share, and interact with you. Here are some key metrics that can be added to a Content report in Advanced Mode to help you monitor your channel engagement:

- **Subscribers gained and lost:** This metric displays information on subscriber gains and losses relative to specific videos. If you find that one specific video has caused a departure of several subscribers, consider removing that video from your channel and avoiding that type of content in the future.
- **Likes (versus dislikes):** This metric captures the percentage of likes out of the total number of likes and dislikes to help you identify the content your audience likes best. This percentage is sometimes called *favorability*.
- **Comments added:** This metric highlights those videos that receive viewer comments. Don't forget the date dimension here to find out when most of the comments are posted.

TIP

If comments are made in the first few hours after you post a video, you may want to make sure you're always available after posting, for immediate engagement. This can be managed from the Comments section of the Channel Analytics left-side navigation menu.

- **Shares:** This metric itemizes which videos are shared the most. You can also take a look at a separate report called Sharing Service, which shows you which social media service your videos were shared on. (You might use this latter bit of information to find out whether your community prefers a particular service, such as X (formerly Twitter) or Facebook.)
- **End screen element clicks and card clicks:** These metrics help you analyze the performance of your end screen elements and cards, showing which ones generate the most clicks. They are covered in detail in Chapter 7.

TIP

In addition to these interactions, one key engagement metric that you should prioritize is achieving high watch time on your YouTube channel. *Watch time* is the cumulative amount of time that your audience watches your videos. Having a high watch time is an indication that your channel and its content are genuinely interesting (and are often associated with driving the highest revenue if your channel is monetized).

Looking at the Engagement tab

The Engagement tab offered by Channel Analytics lets you look at several types of engagement reports to help you assess this key metric. Here's how you use it:

1. **In your web browser, go to `www.youtube.com`.**
2. **Log in to your YouTube account.**

   When you see the blue Sign In button in the top-right corner of the YouTube homepage, enter your email address and password.

3. **Click the Logged-In icon and choose YouTube Studio from the menu that appears.**

   The YouTube Studio navigation menu will appear on the left side of your browser.

4. **Bring up the Analytics section of YouTube Studio.**

5. **Click on Advanced Mode from the top right.**

   For the purposes of this example, say that you want to see which videos drove the highest watch time across your channel.

6. **Within the Advanced Mode window, ensure you are looking at the Content report on the Reports menu.**

7. **To focus on Watch time, select Watch Time (Hours) from the dropdown directly under the Content report tab.**

8. **Select specific videos from the table to compare them in the chart.**

   Select a few of your top videos to see how watch time varies for each one over time. Try to identify patterns that maximize watch time. For instance, maybe videos about dogs bring in higher watch times than videos about cats. Consider adding this type of analysis to your overall content strategy. It will not only increase the likelihood of your audience engaging with your content but also may result in higher ad revenue.

REMEMBER

After you have a general idea how to analyze watch time for your top videos, check out the other Engagement reports, such as top playlists, top cards, and top end screen cards. Drill down into the details of these reports to determine exactly what content your audience prefers.

Engaging the future of Channel Analytics

As you know by now, Channel Analytics is a powerful tool to help you optimize your channel and improve your performance. As the YouTube Studio continues to evolve, some reports and metrics described in this chapter may change slightly. We also expect even more features to be released to help creators enhance their channels, especially related to using AI, which is *exciting.*

IN THIS CHAPTER

- Understanding the types of data used on the Internet
- Using first-party data on YouTube
- Linking your YouTube channel to your Google Ads account
- Getting your data ready for advertising

Chapter 11

First-Party Data: Your Own Secret Recipe

Imagine a world where you could advertise to only your specific customers, show ads to people who have subscribed to your YouTube channel, or show specific ads to specific customers. Imagine you know which of your customers bought a specific product, or which left something behind in their cart? Well, I have good news . . . we are living in this world! Welcome to the world of *first-party data*.

In the older days of advertising on television, newspapers, and radio, content was shown mostly by region, time of day, or specific types of content. You could never really target your ads to specific audiences without a lot of waste. But, in the world of digital, you can advertise directly to your current customers (even those who left things in their shopping cart). There are some limitations, rules, and regulations to this type of advertising. We predict things will continue to get stricter as governments around the world realize how valuable online data is, and how it can be used for good and bad. This chapter explains these different types of data and describes how you can use them profitably yet ethically.

Understanding the Different Types of Data

There are three types of data you can collect: first-party data, second-party data, and third-party data. First-party data is the best and most important data. It's the data you collect yourself, and that is why it is considered the gold standard. YouTube only allows first-party data to be used to target consumers.

REMEMBER

It is important that you understand the differences in data and how to use them because there are different rules and regulations for each type of data, especially on YouTube. The terms first-party, second-party, and third-party indicate how close you are to the source of data. The closer you are to the customer, the more valuable and reliable the data is, and that is why there are different rules for using the data properly. YouTube only allows use of first-party data, and it also has rules about how you can collect that data.

First-party data

First-party data is the information you gather directly from your customers. Think about this as the data customers give to a brand directly. If a visitor goes to your channel and provides their email, phone number, and name, you are collecting their first-party data.

Here are some common examples of first-party data:

- **Customer information:** Names, email addresses, and phone numbers.
- **Purchase history:** What did the customer buy? What did they put in their cart?
- **Website interactions:** What did they look at on the website?
- **Survey responses:** How did they answer the questions on your customer survey?
- **YouTube-specific data:** Which videos did the viewer watch? Which videos did they like?

You get this information because your customers gave this information directly to you.

First-party data can be many different types of data points that you want to collect about your customers or audiences. This data can help you win more customers, improve your user experience, or bring back customers you have lost.

Think of the last time you went to buy a new pair of shoes and the website asked if you want a 15% discount to join an email list, or a 20% discount to give your phone number. They are not doing that to be friendly, they are collecting your data! They will then use the data in different ways to try to get you to buy more shoes. They can even use that data on YouTube, to show you an advertisement for your next pair of shoes.

TIP

To be able to use first-party data on your YouTube channel, you must use Customer Match to upload your audience into Google Ads. Customer Match is explained in detail in the section "Creating Customer Match audience lists" later in this chapter.

Here are a few key rules on using first-party data:

- Your privacy policy must disclose that you share customer data with third parties to perform services on your behalf.
- You must obtain consent for sharing when it's required by law or by any Google policies governing personalized ads and/or user consent, including Google's EU User Consent Policy.

For more information from Google, see this site: `https://support.google.com/adspolicy/answer/6299717?hl=en`.

Second-party data

Second-party data is data you get from close partnerships. Second-party data is the least used of the types. Most data falls into first- or third-party buckets. An example of second-party data is a partnership with a hotel chain and a restaurant chain. The hotel has identified a segment of its customers who frequently order take out while visiting the hotel. They securely share anonymized data about this segment (age, gender, and so on.) with the restaurant chain. The restaurant can then target users while visiting their city, and the restaurant can also promote the hotel to users on their online app. They share the data back and forth, in both directions. This is considered second-party data.

Third-party data

Third-party data is data you purchase from other sources. There are lots of third-party data providers that collect and aggregate data from different places and then sell that data to other people.

Examples of third-party data:

- **Broad demographic data:** Age, gender, and parental status collected across different websites
- **Customer intent**: Likelihood to buy a certain product based on website behavior
- **Location data:** Data based on places customers visited according to their cellular data

TIP

You may have heard of "cookies" discussed in terms of the Internet. You know that popup that asks you if it's okay to track cookies on a website? Cookies track you as you go from website to website. Think about if you were walking through the woods on a snowy day. Everywhere you walked, you leave footprints behind. The cookie is like your footprint as you "walk" around the Internet and visit different websites. A *cookie* is a small file that remembers things you did online — such as what pages you visited, how long you stayed, what you bought, and so on. Those cookies make up many third-party data sources. This type of third-party data is often bought and sold for advertising purposes.

Why does it matter?

Understanding the differences in data is important for several reasons:

- **YouTube advertising:** You can't use second- or third-party data on YouTube! It is important to make sure you are collecting first-party data, so that you can get the most out of YouTube advertising.
- **Privacy:** First-party data is generally considered the gold standard because it's given directly by customers. It is the most privacy-safe data, and that is why YouTube allows only first-party data to be used.
- **Quality:** First-party data is more likely to be accurate and useful to your business because it comes directly from customers.
- **Control**: You control your first-party data, so you know that it has been collected properly and is up to date.

Using First-Party Data on YouTube

REMEMBER

It's important enough to bear repeating — you can only use first-party data on YouTube for advertising. You cannot use third-party data or second-party data for advertising on YouTube. There are two different types of first-party data that you can use:

- **YouTube first-party data via YouTube users lists:** You can create lists based on things users have done on your YouTube channel. For example, you can create a list of users who viewed other videos on your YouTube channel, a list of viewers who have viewed an ad on your channel, and so on.
- **First-party data via Customer Match lists:** Using Customer Match, enables you to show ads to your customers based on data about those customers that you share with Google; you can upload your lists into Google Ads and use them to target your audience.

Each of these methods is discussed in more detail in the following sections.

Creating YouTube users lists

You can generate YouTube users lists (also called *audiences*) based on actions that users take on YouTube. This is slightly different than collecting data yourself using a Customer Relationship Management tool (CRM), but it is still considered first-party data. Instead of collecting names and email addresses, you create "lists" within Google Ads by linking your YouTube channel and your Google Ads account.

This data can be powerful because you can determine what your YouTube viewers watched, what videos they liked, which videos they skipped, what they purchased, and so on. You can then tailor your next videos based on this information.

YouTube users lists can be curated based on the following actions:

- Visits to a channel page
- Views of videos from a channel
- Views of any video (as an ad) from a channel
- Likes of any video from a channel
- Comments of any video from a channel
- Shares of any video from a channel
- Subscriptions to a channel
- Adding a video from a channel to a playlist

Linking your YouTube channel to your Google Ads account

In order to generate some users lists, you need to first link your YouTube channel to your Google Ads account. Follow these steps to do so:

1. **Log in to YouTube Studio by going to `studio.youtube.com`.**
2. **Click on the Settings gear icon on the bottom-left side of the screen.**
3. **Click Channel from the popup window.**
4. **Choose Advanced Settings from the top navigation (see Figure 11-1).**
5. **Scroll halfway down the page until you see the Google Ads Account Linking area and enter your customer ID.**

   Your customer ID appears on the top-left side of your Google Ads account, next to your account name.

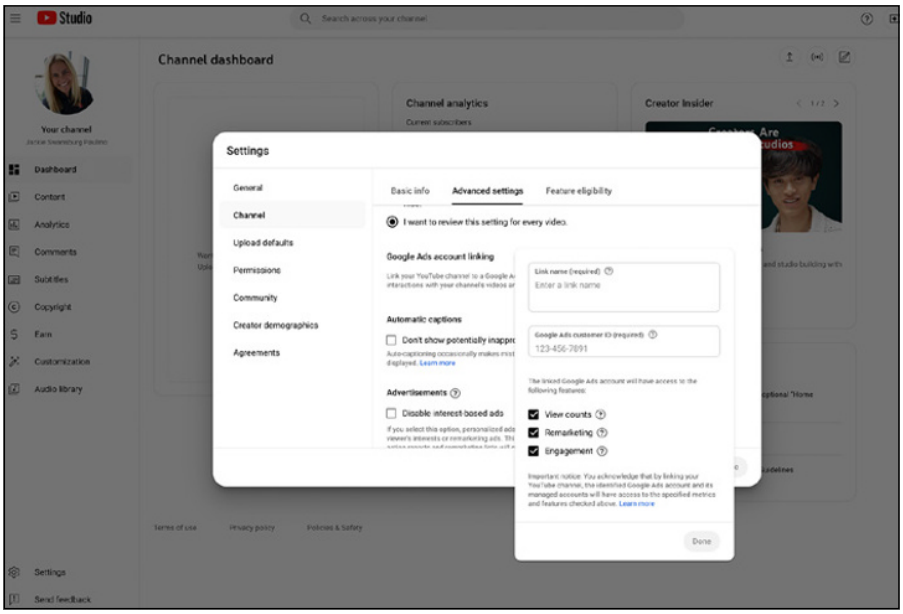

FIGURE 11-1: Linking your YouTube channel to Google Ads.

Once you have linked your YouTube channel and your Google Ads account, you need to add your YouTube users list to the Audience Manager in Google Ads. Follow these steps to do so:

1. **Go to Google Ads at `ads.google.com`.**
2. **From the left bar, click Tools.**

3. **Under Shared Library, click Audience Manager.**

The Audience Manager will appear, as shown in Figure 11-2.

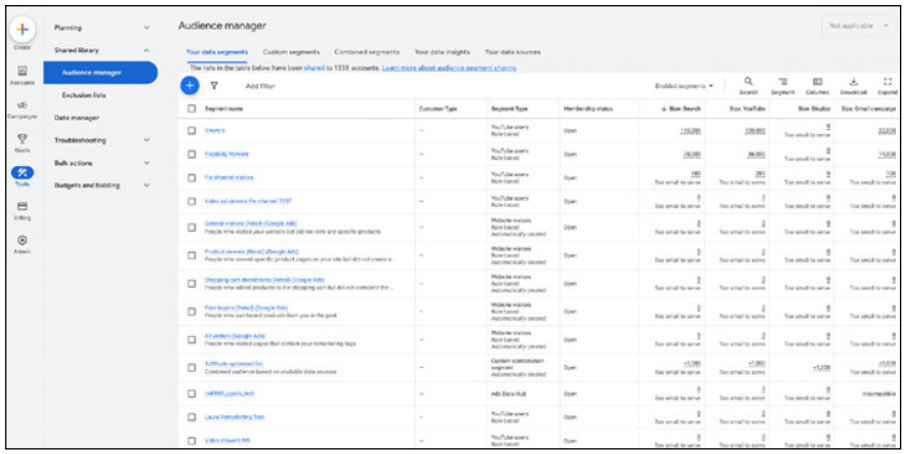

FIGURE 11-2: The Audience Manager window in Google Ads.

4. **Click the blue + button and then click + YouTube Users.**

A form will pop up. Fill in these fields:

- **Segment Name:** Name your user list something you will remember.
- **YouTube Channel:** Select your YouTube channel in the dropdown.
- **Actions:** This is where you fill in the list you want to create. Choose whichever options are most relevant to your list:
- *View Any Video:* A person who viewed any video on your channel.
- *View Certain Video:* If you select this, it will ask you to select a video from your channel.
- *View Any Video (as Ads):* This is a person who has viewed any video from your channel and saw that video as an advertisement only.
- *View Certain Videos (as Ads):* If you select this, it will ask you to select a video from your channel. It will only create the list if the user saw this video as an advertisement.
- *Subscriber to the Channel:* This will target people who subscribe to your YouTube channel. You can also select how many days ago they subscribed, if you would like to select new subscribers.
- *Visited Your Channel Page:* This will target people who have viewed the channel page (main page) of your YouTube channel.

- *Like Any Video:* This will target people who have liked a video. You can also limit this to people who have liked a video within a certain timeframe.
- **Prefill Option:** Select the Pre-Fill Segment with People Who Matched the Rules Within the Past 30 Days option.

5. **Click Continue after you have filled in all the appropriate fields.**

Your users lists (audiences) will now be added to your Audience Manager. You can now use them for your Google Ads campaigns. See Chapter 12 for more information on setting up your campaign on Google Ads.

Creating Customer Match audience lists

As mentioned, Customer Match enables you to show ads to your customers based on data about those customers that you share with Google. With Customer Match targeting, you can also reach new users on YouTube by targeting audiences that are similar to your most valuable customers.

WARNING

Customer Match is not available to all users of Google Ads. Your account must meet several criteria to use it. To use Customer Match, your account must have:

- A good history of policy compliance.
- A good payment history.
- At least 1,000 active users or visitors to upload into Customer Match. (The more you have, the better.)
- Ninety days of Google Ads history and more than USD $50,000 total lifetime spend.

Getting your data ready for advertising

To use your first-party data on YouTube, there are now only three steps to get your data ready for advertising.

1. **Prepare your data file.**
2. **Create your audience list in Google Ads.**
3. **Attach your list to your advertising campaign (covered in Chapter 12).**

Prepare your data file

Google created a template you need to follow so that it can understand your data. You must save this information as a CSV (comma-separated values) file. The CSV file must use these header names in English: Email, Phone, First Name, Last Name, Country, and Zip. Figure 11-3 shows a simple example.

FIGURE 11-3: An example CSV file used to provide Google with customer data.

Email	First Name	Last Name	Country	Zip	Email	Zip	Phone	Phone
test@gmail.com	john	smith	us	94016			1-800-888-8888	
test2@gmail.com	joanna	smith	cn	101300	test4@gmail.com	101500		
test4@gmail.com	zo√´	p√©rez	sg	WC2H 8LG	test6@gmail.com		18008888899	1(800)888-8888

According to Google, the template must meet these requirements:

- Files must be in the CSV format.
- All identifiers for one user record must be comma-separated. Different user records must be separated by a line break. They cannot be separated with a space or semicolon.
- These headers are required: Email, Phone, First Name, Last Name, Country, and Zip.
- You must provide First Name and Last Name fields if you want Google Ads to create a Country and Zip match.
- The Phone column header name is required to upload phone numbers. The only formatting requirement is to include country code.

For more information, visit Google's help page on formatting your data: `https://support.google.com/google-ads/answer/7659867`.

Create your Customer Match audience list

Follow these steps to Create your Customer Match audience list:

1. **Go to Google Ads at `ads.google.com`.**
2. **From the left bar, click Tools.**
3. **Under Shared Library, click Audience Manager.**

   The Audience Manager window will appear, as shown in Figure 11-4.
4. **Click the blue + button and choose + Customer List.**

   The Data Source window will appear, as shown in Figure 11-5.

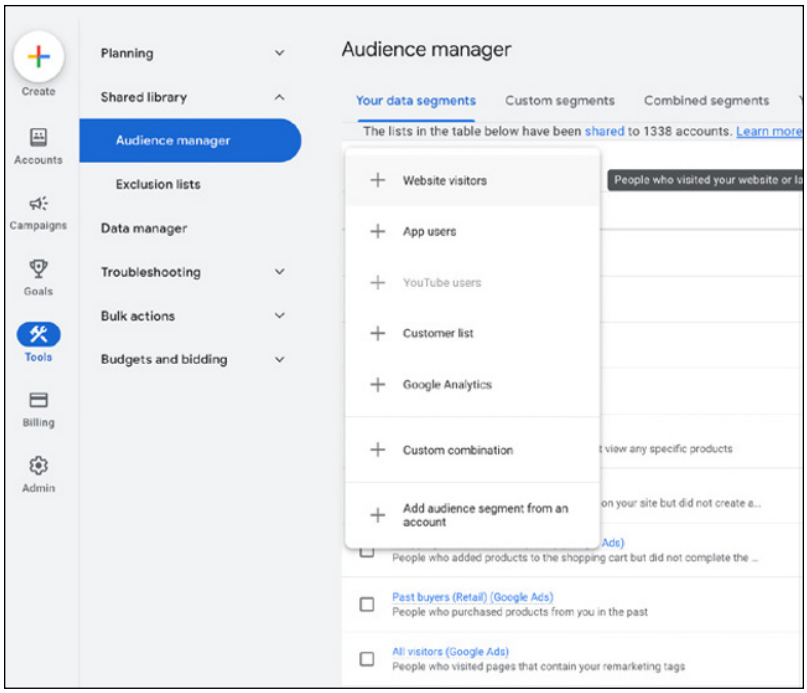

FIGURE 11-4: The Audience Manager window.

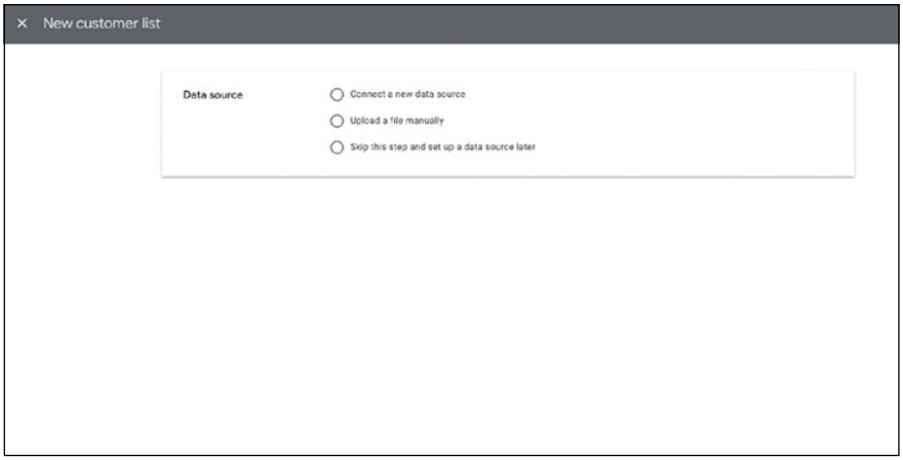

FIGURE 11-5: Use the Data Source window to indicate where your data comes from.

5. Choose Upload a File Manually.

A form will pop up for you to fill in and upload your data into Google Ads:

- **Segment Name:** Name your audience something that accurately defines this audience, such as "Current Customers" or "Rewards Members."

- **Customer Type:** Choose the customer type that best describes your list. This is an optional step, but it will help keep you organized if you select an option. Options include All Customers, Purchasers, Cart Abandoners, and Others.
- **Data to Upload:** Choose Browse and then find your CSV file on your desktop or laptop.

REMEMBER

Google will ask you to check a box here that says you comply with all Google's Customer Match Policies. "This data was collected and is being shared with Google in compliance with Google's Customer Match policies."

Attach your list to your advertising campaign

Now that your audiences have been added, you can use them for your Google Ads campaigns. Chapter 12 explains how to set up your campaign on Google Ads.

A Brand Example: Zeus' Café

This example uses a fictitious small-town coffee shop called Zeus' Café. It has one location, in Springfield that is doing great, and they are about to open their second store in the next town over, Newtown. They want their current customers to know about the new store, especially their loyal customers who live in Newtown. They have a YouTube channel where their customers love to watch videos on their latest latte recipes and follow along for the coffee of the week.

Zeus' Café first-party data examples

There are a few ways that Zeus' Café can collect first-party data from their customers. They can create their two types of audiences for YouTube advertising:

- **First-party data via Customer Match lists:** Using Customer Match, Zeus' Café can upload their first-party lists into Google Ads and use this to target their audience.
- **YouTube first-party data via YouTube users lists:** Zeus' Café can create remarketing lists of viewers based on past interactions with their videos, YouTube ads, or YouTube channel. Remember, they can do this because their YouTube channel is linked to their Google Ads account.

REMEMBER

First-party data is the type that you collect yourself. Zeus' Café cannot buy email addresses from the Newtown Newspaper, for example, and use those email addresses in its YouTube advertising. That is an example of third-party data, and that is against YouTube's policies.

Remember, the examples of first-party data? Let's put those in the context of Zeus' Café:

- **Customer information:** Names, email addresses, and phone numbers of customers who frequent the cafe.
- **Purchase history:** What types of coffee do people order? Are they latte drinkers or croissant eaters?
- **Website interactions:** Do these customers order coffee beans from the website? Do they have a recurring monthly shipment of their beans?
- **Survey responses:** Survey data on the types of coffee customers like, days they want the new cafe to be open, and new coffee and food ideas. Zeus' Café has an in-person survey in the store.

Zeus' Café could collect customer information from the following:

- **Loyalty programs:** Zeus' Café created a loyalty program and asked for customer information in exchange for every 10th coffee free.
- **Website promotions:** Even in-store, they ask people to sign up on their website for discounts or access to specialty items online.
- **Email sign-ups:** Even in-store, they ask people to sign up for their online newsletter. They send an email to ask their customers specific questions.

Zeus' Café could collect purchase history information from the following:

- **Loyalty cards:** They can track common purchases tied to specific loyalty cards to determine what their users are buying.
- **Website tracking:** They use Google Analytics and other tools to track website behavior such as purchases, items in cart, or bounces.

Creating YouTube lists

Zeus' Café chooses to create YouTube lists using the following YouTube metrics. They are fortunate because their audience sizes are big enough to create meaningful lists from this data, which is easy to collect.

- Anyone who visited a channel page
- Anyone who viewed any video from a channel

- Anyone who commented on any video from a channel
- Anyone who subscribed to a channel

Zeus' Café can now use these audiences/lists to expand their audiences on YouTube and their customer base by serving them personally-directed ads. See Chapter 8 for other ideas for driving more traffic to your channel.

REMEMBER

Zeus' Café must segment each of its lists and tailor the message of its videos to specific users. They need to create simple videos for each audience and tailor the message of each video to these specific users. For example, if they are serving ads to customers who purchased coffee on their website, they may want to highlight their recurring shipping option on the website and offer a discount code for those who watched the video.

Here are a few ideas for how Zeus' Café can use its first-party data for marketing campaigns:

- **Customer information:** Run seasonal campaigns to advertise new seasonal offerings to their best customers. Run another campaign to make sure that current customers know about the new store.
- **Purchase history:** Create a "win-back" campaign to advertise (new products and maybe the new store) to customers who have not visited in a while.
- **Website interactions:** Offer customers who bought coffee online a discount if they sign up for monthly shipments.
- **Survey responses:** Show their customers they listen to feedback. If there was something that customers called out that needs improvement, Zeus' Café should show off the improvements with a custom video.

In this chapter you learned the importance of using first-party data for your marketing efforts on YouTube. Remember, it is important to understand the differences between first-, second-, and third-party audiences to make sure that you are always in compliance with the platforms you are using and their policies. Google and YouTube only allow first-party data, so it is important to remember that you only use data that you collect yourself — never data that you buy from a third-party.

You can now use both types of YouTube first-party data to improve your marketing — YouTube users (audience) lists and your own first-party data via Customer Match. To get the most out of these marketing strategies, create separate lists and tailor your message to each of your customer types/audiences.

4 YouTube Channels Are Serious Business

IN THIS PART . . .

Considering your YouTube advertising options

Exploring the earning potential of YouTube

Incorporating AI to help boost your YouTube channel

IN THIS CHAPTER

- Using advertising to reach a broader audience on YouTube
- Setting up and running a YouTube ad campaign
- Understanding different ad formats
- Understanding different targeting tactics
- Creating your first YouTube ad
- Understanding the importance of earned metrics

Chapter 12

Expanding Your Audience with Paid Ads and Promotions

Seeing your YouTube channel grow organically over time can be a rewarding experience, but you don't have to wait around for people to find your content. You have another powerful resource in your tool chest that can take your channel to the next level — *advertising*. Yes, this chapter is all about how to place ads on YouTube to promote yourself and grow your channel — it's not about how to get advertisers to place ads on your channel (that's called *monetization* and it's covered in Chapter 13).

Before we get too far ahead, remember that you need to have set up your channel and uploaded *at least* one video before you can set up an advertising campaign. If you haven't done that yet, jump back to Parts 1 and 2 of this book!

Understanding YouTube Advertising

Before you close this book with a sigh, sure as sure can be that advertising is nothing more than a fancy way of throwing away money and annoying people, you'd better think again. YouTube advertising is highly effective because it allows you to reach a large part of your target audience who may not have discovered your channel on their own yet. Unlike many other types of advertising, a well-run YouTube ad campaign ends up delivering views, increased watch time, and additional subscriber growth, all of which improve your channel's likelihood of success. Why? Because effective YouTube advertising can help with *discoverability*, creating a virtuous cycle for your channel. A well-targeted ad campaign lets the most engaged viewers discover your channel — and engaged customers are the ones you really want to reach. Once they subscribe and watch other videos on your channel after seeing your ads, your channel's ranking will improve, which in turn will let other viewers with similar interests discover your content. This happens through YouTube's recommendation algorithm.

Using a skippable ad

YouTube advertising is accessible to creators by way of *Google Ads*— one of the world's most popular advertising platforms. As you can probably imagine, you can buy many types of ads via Google Ads to advertise on YouTube. For instance, chances are good that you've seen the big video masthead ad on YouTube's homepage. This chapter focuses on the most common video ad type you configure via Google Ads. It's the YouTube *skippable* ad.

A skippable ad is different from many other types of ads because you, as the advertiser, pay only if the viewer does something concrete, such as watch your video ad or click on a link to visit your website. A *pre-roll* ad is a skippable video ad shown immediately before a video that a viewer clicked to see. If you've been on YouTube, you've seen them. They're the ones that let you skip after five seconds. Concerned that tons of people are sure to skip off after the first five seconds? Don't be. The good part about skippable ads is that you pay only for the viewers who choose to watch rather than those who skip. In other words, you pay only for viewers who have a strong interest in the ad you've put in front of them.

REMEMBER

Most creators should have no problem setting up an ad campaign for YouTube. Google has worked hard to make Google Ads a user-friendly experience. Though you must complete quite a few steps to set up an ad, most of the time, you can simply use the default settings. Over time, you can tweak the settings to produce even better results, but for your first campaign, we recommend sticking with the defaults.

Understanding the advertising game

You may believe that Google is simply a big search engine company, but it's really a big *advertising* company — that's where it makes its money. The same logic holds true for YouTube: People think of it as an amazing video site, but at its core, it's a major advertising platform.

A fortune is being spent and made on YouTube. You know all those YouTube stars, like Mark Rober and Dude Perfect? They're earning a hefty sum of their money from advertising. Granted, they're also now signing other types of lucrative endorsement deals, but their YouTube fame led to their first fortune — and that came from advertising.

REMEMBER

There are two sides to the advertising equation:

- **Advertiser:** The person or organization paying for and placing the ads
- **Publisher:** The person or organization whose property has the ad placed on it and who receives a cut of revenue from the ad

On YouTube, you can be an advertiser or a publisher, or both. In this chapter, you read about the advertiser side. Chapter 13 tells you all about the publisher side.

REMEMBER

Google and YouTube help on both sides of the advertising equation and have product offerings for both use cases. On the advertiser side, you use Google Ads, which we cover in this chapter. On the publisher side, you use Google AdSense to manage how your YouTube channel receives ads. (For more on Google AdSense in a YouTube context, check out Chapter 13.) Don't assume that you have to connect with publishers directly. Google acts as an intermediary — for a share of your profits, of course.

Recognizing the importance of ad policy

If you're new to YouTube advertising, take a few minutes to learn about its ad policy, which basically states that advertising should conform to certain platform standards. Since policies change and evolve over time and can be regionally specific, check out `https://support.google.com/adspolicy` for more detail. At their core, these standards are not so different from YouTube's community guidelines, which we discuss in Chapter 3.

WARNING

Community guidelines are upheld nonstop, all day and all year. Not only do violations jeopardize your ability to advertise, but they can also result in having your channel taken down.

Looking at YouTube ad types

Although we focus on YouTube skippable ads in detail in this chapter, YouTube offers several other video ad formats to help advertisers achieve different goals. Here is a helpful reference that covers the main types of video ads currently available on YouTube:

- **Skippable ads:** Play before, during, or after another YouTube video. Viewers can skip these ads after five seconds, and advertisers are only billed if a user watches the ad to completion or for 30 seconds (whichever comes first) or interacts with the ad by clicking on the associated URL, call-to-action overlay, or companion banner. Use skippable ads if you want to expand your audience, but only pay for reaching really engaged viewers. (see Figure 12-1).
- **In-feed ads:** Appear as a thumbnail image with text on the YouTube homepage, search results, and recommended feeds on the video watch page. Advertisers are billed when a viewer clicks on the ad to watch the video. Use in-feed ads to promote your content in places where users are typically discovering new content, as you may entice them to watch your video.
- **Non-skippable ads:** Play before, during, or after another YouTube video; however, viewers are forced to watch the ad to completion (maximum of 30 seconds). Advertisers are billed on the total number of impressions that are delivered. This format works best for creators who want to get their message out without interruption.
- **Bumper ads:** Short, six-second non-skippable video ads that play before, during, or after another YouTube video. Like longer non-skippable ads, these are also billed on impressions. This format works best to reinforce a short message with viewers.
- **YouTube Shorts ads:** A swipeable ad format that shows up in the YouTube Shorts video feed alongside regular Shorts videos. This format can be billed a number of different ways depending on your campaign setup. Shorts ads are best for reaching people with short clips of your longer form content, to encourage them to watch longer videos on your channel.

TIP

Since YouTube prioritizes videos with longer viewer-session watch times and high engagement rates in its search results and recommended feeds, highly engaged viewers from paid ads can boost your channel's organic growth. Just don't push your ads on a disinterested audience, or you might end up with a bit of negative feedback.

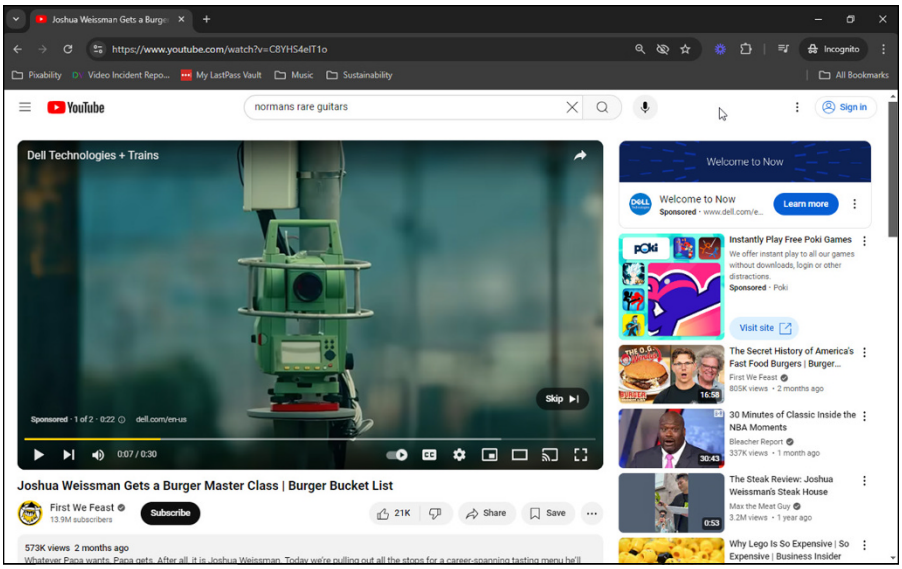

FIGURE 12-1: A skippable video ad appears on top of a popular YouTube video.

Planning for Advertising

To better illustrate the process of advertising on YouTube, this section walks through the steps of building a skippable ad campaign from scratch. First and foremost, you need a Google Ads account, which you can easily create using your regular Google account.

Creating a Google Ads account

REMEMBER

Google might change the sign-up process and its billing practices at any time, so take the preceding instructions with a grain of salt. They may be accurate for years — or they may be out of date one week after this book is published.

1. **Point your web browser to `ads.google.com`.**
2. **Click the Sign In button at the top right and log in with your Google account.**

   We recommend using the same Google account you use to manage your YouTube channel.

TIP

If you already have a Google account for Gmail, YouTube, or another Google service, you can use it for your Google Ads account. If you're a Gmail junkie, for example, connect the accounts so that you don't sign yourself out of Google Ads every time you check your mail. If you already have a Google Analytics account (a free service that measures what visitors do on your website — see

Chapter 10), the email address of your Google Ads account must be the same as your Analytics admin user email.

3. **On the new screen that appears, click the New Google Ads Account link to create an account.**

   Doing so opens up a pop-up window that says Create Your First Campaign in a Few Simple Steps. Click the Create Your First Campaign button at the bottom of that pop-up to continue.

4. **(Optional) Enter your business information.**

   To get started, you can enter your business name and website. If you don't have these, that's okay! They are optional. Proceed by clicking the blue Next button at the bottom right of the screen.

5. **On the next screen, link your YouTube account to your new Google Ads account by clicking the blue Add button.**

   As shown in Figure 12-2, doing so will open a side panel where you will see your YouTube channel already selected. If you want to connect a different YouTube channel, you can use the search feature. Once you have selected your channel, click the blue Next button.

6. **Review the information under the Configuration settings.**

   As shown in Figure 12-3, you can decide what you want to name your connection between your Google Ads and YouTube account, as well as what information you want to share between accounts. Linking your Google Ads account to your YouTube channel will allow you to access deeper ad analytics and set up YouTube remarketing lists in the future.

TIP

We recommend selecting all options as part of your initial campaign, to maximize the benefit of connecting your accounts.

REMEMBER

You can unlink the Google Ads account that you associated with your YouTube channel at any point, if you feel so inclined. Just remember that by unlinking your accounts, you lose access to earned metrics, which measure the impact your advertising has on important channel metrics, such as views and subscriptions. You can find out more about earned metrics later in this chapter, in the section "Getting earned metrics."

7. **Review the information and complete the link process.**

   On the final step of the side panel, review the information you selected and click the blue Link button to connect your accounts. If everything works correctly, you will see a green success message that reads Link completed. Click Done on the bottom left of the panel to return to the account setup page.

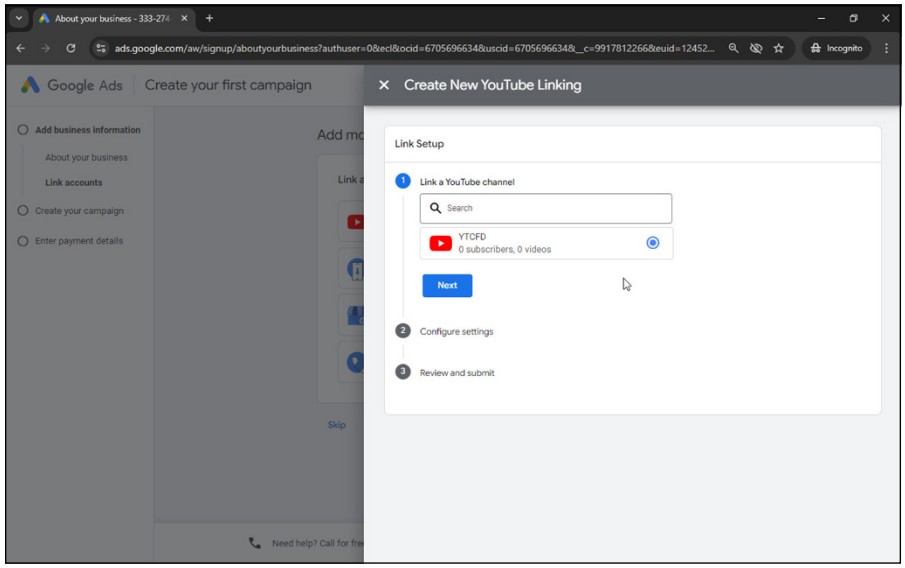

FIGURE 12-2: Connecting your YouTube account to your Google Ads account.

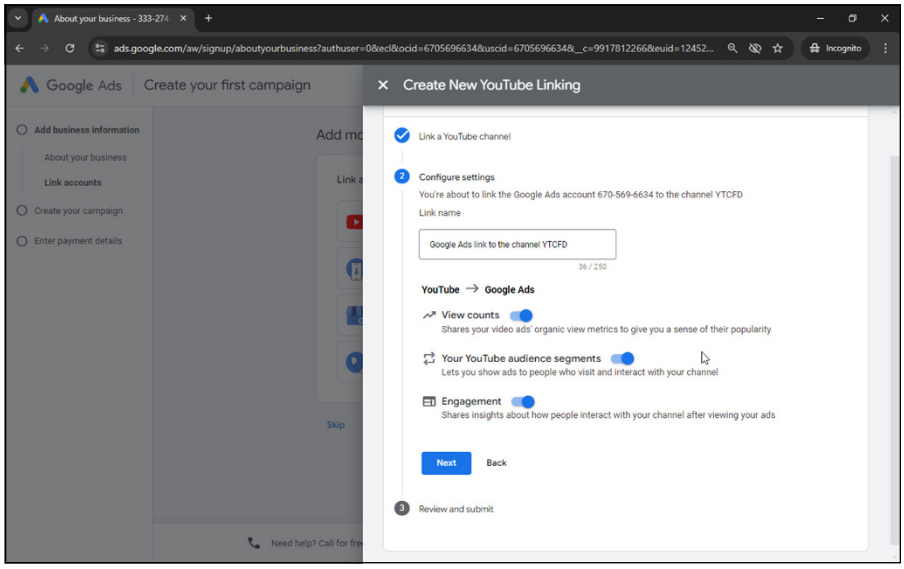

FIGURE 12-3: Selecting what data is shared between your YouTube and Google Ads accounts.

8. **Once you are back on the setup page and have successfully linked your YouTube account, click the blue Next button on the bottom right to continue.**

   The next window will take you through a step-by-step process to build your first ad campaign and these steps are covered in the next section.

Creating your first campaign

Continuing with the onboarding process, the next steps of Google Ads account creation walks you through the process of setting up your first campaign.

1. **To begin, select Brand Awareness from the list of campaign goals.**

   The goal of brand awareness (see Figure 12-4) is to build a skippable ad campaign and start reaching new viewers who may turn into longtime subscribers. Click the blue Next button at the bottom right to continue.

2. **Choose the Video campaign type.**

   On this screen, you will see options for the types of campaigns you can run. Select the Video campaign type to continue building your campaign.

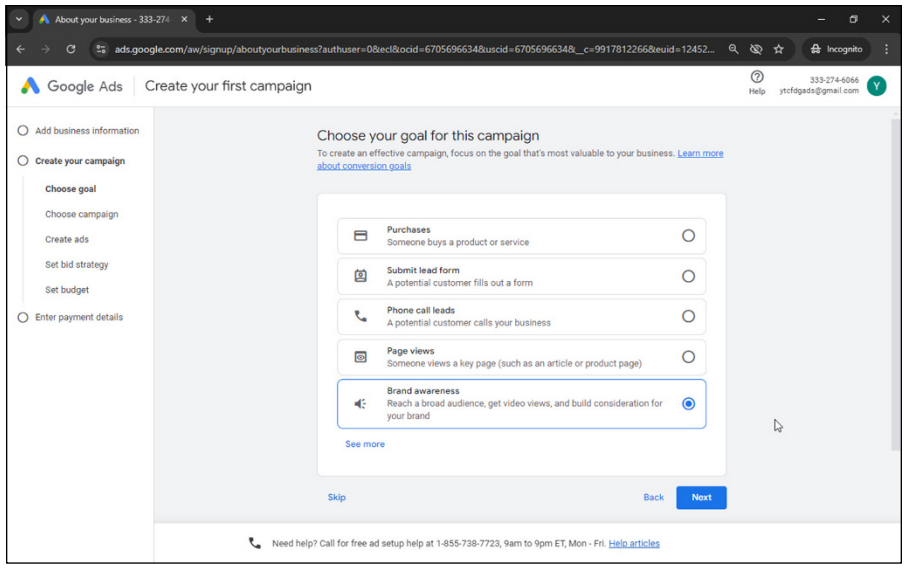

FIGURE 12-4: Selecting the brand awareness campaign goal.

3. **From the campaign subtype menu on the same page, select Video Views.**

   Below the campaign type menu, you will see a menu to select a campaign subtype. Select the Video Views subtype to build a skippable ad campaign.

   Selecting the Video Reach subtype will allow you to create different ad formats like bumper ads and non-skippable ads, which are purchased on a different pricing model and can help achieve different goals than a skippable ad. There is also an option called Standard Video, which lets you create a number of video ad types without guidance.

4. **Click the blue Next button to continue to the next step, which will take you through the finer details of setting up your campaign.**

Determining your general campaign settings

You have now arrived at the more detailed campaign setting workflow. Here you select your budget, set the length of time you want your ad to run, select who you want to target, and choose a video to promote to new viewers.

1. **Name your campaign something descriptive.**

   Give your campaign a memorable name so that you can remember what its purpose is in the future. Your name can include things like what video you promoted, who you targeted, and when the campaign ran. If you plan to segment your targeting into separate campaigns, add words such as *mobile* or *desktop* to the campaign name. If you're not completely sure of these details, don't worry! You can edit the name later on.

2. **Set your budget (see Figure 12-5).**

   Google Ads allows you to select one of two budget types: a campaign total budget or a daily budget:

   A *campaign total budget* specifies the total amount of money you want to spend for the duration of your campaign. This method is useful when you're running a single YouTube campaign, such as the one you are currently building in these steps. Google optimizes your campaign spending for you and aims to spend your total budget by the campaign end date.

   A *daily budget* specifies the average amount you want to spend *each day* over the course of your campaign. This method requires a bit more precision because Google can spend up to twice as much as your daily campaign budget for you on days when a lot of people are browsing YouTube. However, if you're interested in manually optimizing your budget across multiple campaigns, a daily budget is the way to go.

   You can increase or decrease your budget at any time, so enter an amount that you feel comfortable experimenting with to begin. Start with a small amount, such as $10, and increase it gradually as you start seeing the results you want.

3. **Set your start and end dates (see Figure 12-5).**

   The start date indicates when you want the campaign to launch. If you want to launch the campaign by the end of this chapter, set the start date to today (which should already be set by default).

Be sure to also set your end date. This will guarantee that your campaign will stop spending money by a certain date and prevent you from exceeding your budget. For this first campaign, set the end date to five days out. At a $10 total budget, that means you will spend approximately $2 per day.

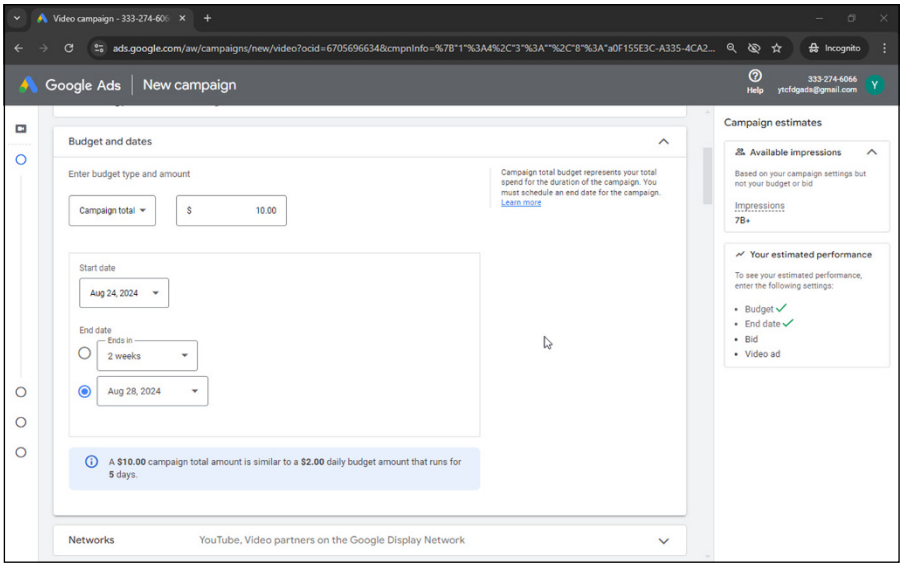

FIGURE 12-5: Entering budget and campaign flight dates.

4. **Set your network settings to YouTube only.**

   Since you want to reach new viewers on YouTube, be sure to select "YouTube" as your only network. This means deselecting video partners on the Google Display Network. If you leave that setting enabled, your ads may run on websites outside of YouTube.

5. **Select the location targeting.**

   By default, your location targeting will likely be your base country. However, when you click the Enter Another Location button and select Advanced Search, you're accessing a powerful interface that lets you target your ads precisely, down to the city or area level. You can also exclude locations, such as cities within a specific country, if you choose. Whatever location target you decide on should be part of your overall advertising strategy. Keep in mind that if you choose a location target that is too narrow, you may have a more challenging time reaching your audience.

6. **Set the languages that your audience speaks.**

   By default, this is set to all languages, but you can change it to specific languages if you prefer. For instance, if your channel is only in English, it may make sense to limit your language targeting to other English speakers.

7. **Deselect multi-format ads.**

   Since you are creating a skippable ad here, you should deselect the multi-format ad option. This may be a good option for you to experiment with in the future, as it is optimized to reach your audience in a variety of ad formats with ease. The only consequence of selecting this is that you lose control over the type of ad format you are running. If you want to be sure you are only paying for ad views from highly engaged viewers, deselect the multi-format ad option.

8. **Consider your options for Additional Settings.**

   If you click on the Additional Settings dropdown, you will see options for specific device targeting, frequency capping, ad scheduling, and more. These advanced features give you finer control over how you want your campaign to be run:

   - If you want to target just mobile phones, for example, you can configure that setting under the Devices dropdown.
   - Or, if you want to control the number of times a unique user views your ad over a given period, such as a day, week, or month, you can use frequency capping.
   - Additionally, ad scheduling is helpful if you know when your viewers are watching and will likely see your ads. For example, if you're in the beauty or fashion business and you want to target women getting ready to leave home for the workplace, you can schedule your ads for weekday mornings.

Determining Your Ad Targets

After your general settings are in place, you need to determine who will see the ad. This is known as *ad targeting*. Google Ads provides extremely rich and powerful targeting options. Each set of options can be broken into separate *ad groups*, and you can use multiple, simultaneous ad groups in the same campaign.

TIP

If you want to jump ahead to continue with the campaign building instructions, jump down to the "Creating an ad group and setting up targeting" section.

REMEMBER

Running a YouTube ad campaign isn't like placing an ad in a magazine or a commercial on television, where the ad is placed and you're done. Effective digital marketing — marketing that relies on YouTube and on display and search advertising — allows advertisers to constantly optimize, or tune, ad performance by making adjustments throughout the campaign, which may include changing the targets.

TIP

You can set up multiple ad groups throughout a campaign, so don't try to be exhaustive right out of the chute. You can always update your targeting after your campaign launches, too.

To continue with your campaign setup, you need to get a handle on the basics of ad targeting. The default Google Ads setup lets you target using the following criteria:

- **Audiences:** Who you want to reach
- **Content:** Where you want your ads to show on YouTube

Audience targeting

When it comes to targeting people, Google Ads gives you a few options to choose from:

- **Basic demographics:** This option lets you select your audience characteristics by age, gender, parental status, and household income. Always choose the age and gender of your target audience, if you know it. (Household income isn't available in all countries.)

  YouTube doesn't let you target viewers under the age of 18. In fact, if you are promoting content made for kids (anyone under the age of 13), you need to comply with the Children's Online Privacy Protection Act, also known as COPPA, which may restrict your advertising opportunities. For more information on COPPA compliance on YouTube, visit Chapter 13.
- **Interests:** This option lets you identify specific viewer characteristics and interests that you want targeted and narrows your reach from just plain demographic targeting. This targeting allows you to reach viewers who are interested in a certain content category even when they're interacting with unrelated content. Google determines viewers' interests by analyzing the type of videos they're watching and by the types of websites they're visiting.
- **In-market and life events:** People actively researching products or shifting purchasing behavior and preferences during life milestones, such as a job change, moving, or getting married.
- **Detailed demographics:** People who share common traits, such as parents of teens, college students, and homeowners or renters.
- **Affinity and custom interests:** People based on their lifestyles, buying habits, or longer-term interests.

- **Your data:** This is first-party data you own that you can leverage to target people who have already engaged with your content. Chapter 11 covers first-party data in detail.
- **Remarketing:** People who previously interacted with your video content or website can be accessed as a segment under Your Data.

TIP

Remarketing is one of the most powerful types of targeting you can leverage on YouTube because it helps keep your brand relevant to your audience, increasing the likelihood that they will engage with your content again. With remarketing, you can target viewers who have previously interacted with your channel, videos, or website. An interaction means they have done one of the following:

- Viewed your content
- Watched your ads
- Engaged with or shared your videos
- Visited your channel
- Subscribed (or unsubscribed) from your channel

By linking your Google Ads and YouTube accounts, you can remarket to these viewers or visitors.

REMEMBER

Remarketing is just a fancy term for targeting users who have already interacted with you. Google and YouTube privacy rules prevent you from knowing who they specifically are, but that shouldn't prevent you from giving those remarketed viewers a more customized ad experience. For example, if viewers have watched a particular video, you can serve them a different video ad next, rather than the same one. You can even exclude a remarketing list from your campaign if you want to ensure that you show ads only to people who have never seen your content.

Content targeting

For content targeting, Google Ads gives you a couple different options as well:

- **Keywords:** This option lets you target videos that are relevant to the keywords you itemize. For example, if you have a video ad for your pottery product, *pottery* is a good keyword to add to your campaign.

REMEMBER

Start off with broad keywords; you can always add more niche terms after testing to narrow your reach. It's also a good idea to group similar keywords together so that you can separate them into distinct ad groups. This makes it much easier to optimize your performance later on. If you're having difficulty coming up with keywords, consider using the Google Ads Get Keyword Ideas

feature (accessible within the campaign targeting setup workflow for keywords) to generate a broad list of keywords based on your business.

TIP

Adding a minus sign (–) in front a keyword ensures that your ad doesn't show against content that matches this keyword. For example, if you don't want your audience to be reminded of the fact that pottery might break, you might enter **–glue** as a keyword to filter out any videos dealing with glue. You can actually exclude any of the types of targeting we talk about in this main section. For an example of how to exclude audiences from your ad campaign, visit `https://support.google.com/google-ads/answer/2549058`. The process is similar for demographics, topics, and placements.

- **Topics:** You can target specific content on either YouTube or the Google Display Network (GDN) corresponding to a selected topic. When configuring topic-based targeting, you can go broadly, such as Home & Garden, or be more specific in the category, by selecting Rugs & Carpets under the Home Furnishings subcategory. (**Note:** You can select different topics in the same group.)
- **Placements:** You can create a list of YouTube channels, specific videos, exact websites, or itemized pages in the GDN where you want your ad served. This is an excellent way to ensure that your content is appearing in the right places, next to videos about specific topics. (Placements apply only to YouTube videos and to the GDN, not to YouTube Search.)

REMEMBER

We're giving you the lay of the land right now when it comes to preparing for your YouTube ad campaign. As for the nuts-and-bolts of setting up a YouTube ad campaign, see the "Creating a YouTube Ad" section later in this chapter. For more information on all the targeting types available on YouTube, visit `https://support.google.com/google-ads/answer/2497941`.

Creating an ad group and setting up targeting

To ensure that your targeting isn't too narrow, we recommend building one specific ad group per targeting type. To specify the audience targeting for your first ad group, follow these steps:

1. **Continuing from the last step in the previous section called "Determining your general campaign settings," enter a name for your ad group in the Ad Group name field.**

   Similar to choosing your campaign name, consider naming your ad group something meaningful by calling out the type of targeting it will contain. This makes it easier to understand your campaign performance later.

2. **(Optional) Name your audience.**

   If you'd like to save your audience for use in the future, you can give your audience a name. This is an optional step, but may save you time for future campaign builds.

3. **Select your demographics targeting.**

   You can select any combination of age, gender, parental status, or household income by selecting or deselecting the respective categories (see Figure 12-6). Remember that household income isn't yet available in all countries.

4. **(Optional) Add interests and detailed demographic targeting.**

   Search for specific terms, phrases, or website URLs to find relevant audience targets to add to your campaign. You can also click the Browse option from the Interests & Detailed Demographics submenu to see a full list of all available audience types, if you prefer (see Figure 12-7). We describe all available options in detail earlier in this chapter, in the "Audience targeting" section.

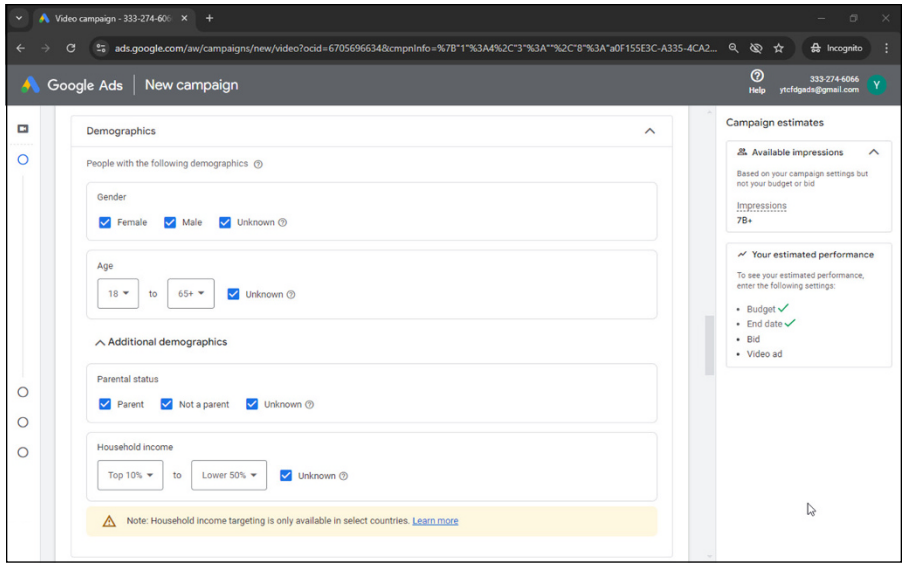

FIGURE 12-6: Selecting demographic targeting.

5. **(Optional) Add segments from your first-party data.**

   If you have customer lists or remarketing segments, you can choose a segment this section. Keep in mind that selecting any previous targeting tactics and remarketing will result in a narrow campaign reach. It's best to choose remarketing lists alone if your goal is to use remarketing. For more on first-party data, see Chapter 11.

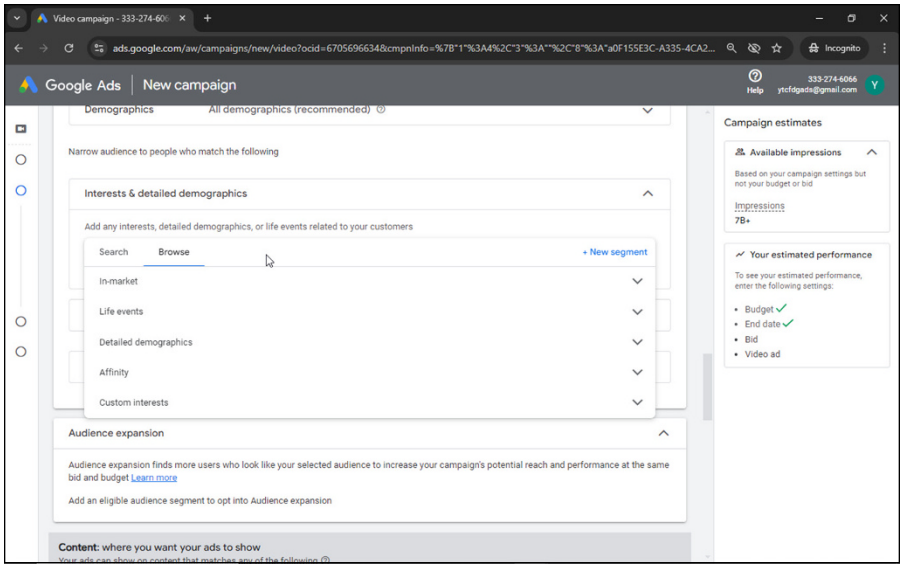

FIGURE 12-7: Selecting interests and detailed demographic targeting.

6. **(Optional) Add keywords, topics, or placements targeting.**

   We explain the purpose of these targeting types earlier in this chapter, in the "Content targeting" section. Each of these targeting types specifies the types of content you want your ads to run on. When you're happy with your selections, move on to the next section.

Creating a YouTube Ad

With the campaign and ad group targeting settings completed, you must now associate an ad with your campaign.

REMEMBER

The video you use has to be uploaded to your YouTube channel before you do this. Videos that are to be used as ads need to be set to Public or Unlisted. If you need more information on video uploads, be sure to check out Chapter 7.

Here's how to get that scintillating ad of yours in front of your viewers:

1. **Continuing from the last step in the previous section, in the next section of the campaign creation workflow, paste the YouTube video URL of your ad into the Your YouTube Video field.**

   As soon as you paste a correct video URL, you see your video with its thumbnail picture, and several additional options appear.

REMEMBER

Your YouTube ad might be the first thing people see about your company, so use a video that is short, catchy, and to the point.

2. **Select the video ad format you want to use.**

3. **Configure your skippable ad by filling in the new fields that appear.**

Here's a rundown of the in-stream fields you need to fill in (see Figure 12-8):

- **Final URL:** This is the actual web location where viewers end up after they click.
- **Display URL:** This is the website link that is shown on your video ad.

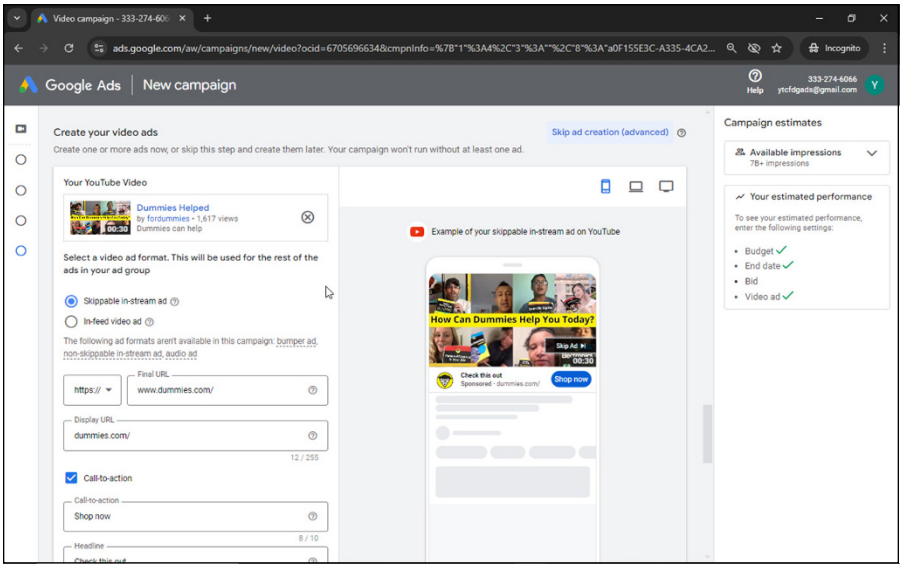

FIGURE 12-8: Creating a skippable in-stream ad.

REMEMBER

Do not indulge in bait-and-switch tactics. Always send viewers to a web page that clearly has something to do with the ad. If you try to trick your viewers, you'll only end up wasting your ad budget and alienating viewers who may be interested in your channel, product, or services. You'll also likely have your ads blocked by Google, as this falls under their misrepresentation policy.

- **(Optional) Call-to-Action:** This optional feature gives you another opportunity to convince a viewer to engage with your ad. With a call-to-action overlay, you have 15 characters to create a compelling headline and 10 additional characters to entice users to take an action, such as click on your link. This appears as soon as your video starts playing in the lower left of the advertisement. This feature is recommended when website clicks are your primary campaign goal. See Figure 12-9.

- **Companion Banner:** This optional feature is a 300 x 60-pixel image that appears next to your video ad. The companion banner should have a strong call to action so that viewers are more likely to click on it. Note that the companion banner is the only element that remains after your video ad has finished playing or has been skipped by the user. If you don't have one ready, you can opt to use a default banner, which is automatically generated by YouTube using elements from your channel. See Figure 12-9.

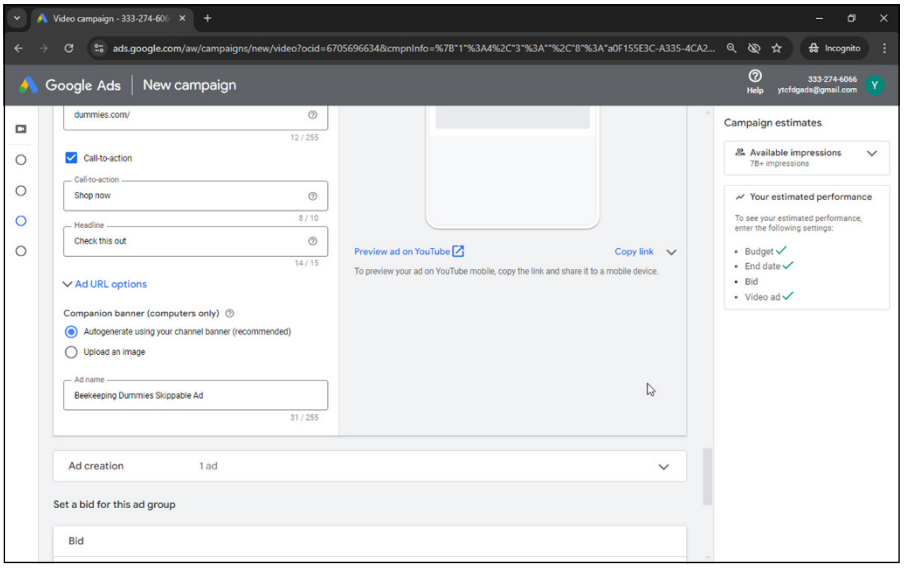

FIGURE 12-9: Call-to-action and companion banner configuration.

4. **Enter the name of your ad in the field provided.**

   Use a descriptive name that makes it easy for you to identify the ad later.

5. **Under Bid, in the Maximum CPV bid field, enter a maximum cost per view (CPV) bid for your campaign.**

   This is the maximum amount you're willing to pay each time a viewer watches your video to completion or for 30 seconds (whichever comes first), interacts with your ad's clickable elements, or clicks on your video ad. A good amount to start with is five cents. You can increase or decrease the amount later, after your campaign starts running.

TECHNICAL STUFF

TrueView ads are sold on an auction basis. You're competing with other advertisers who want to reach a similar target audience and are willing to bid a certain amount per view. If your bid is too low, you won't win at the auction very often. Your ad won't get many views, and you'll need to adjust your bid. If you leave a campaign running year-round, take seasonality into account and

understand that you may need to raise your maximum bid to win enough views during high-volume ad buying seasons, like the beginning of December.

6. **Click the Create Campaign button at the bottom of the screen.**

7. **On the new page that appears, enter your payment details.**

   Depending on how you want to register your account, set your payments profile for individual or organization and add your credit card information.

8. **Once everything is complete on the billing page, click the blue Submit button on the bottom right of the page.**

   On the next few pages, Google prompts you with a few different messages. First, review the message indicating when your ads will go live. Then click Next.

TECHNICAL STUFF

On the following page, you will see instructions to set up a Google Tag on your website. A Google Tag allows you to track website visitors and actions like conversions and tie them to your Google Ads advertising campaigns. This step is optional and not necessary for launching a basic YouTube campaign. If you have web development skills or a friend who does, maybe you'll want to install your Google Ad Tag right now. However, if you don't, you can get out of this flow by clicking the Test Connection button on the bottom right, and then the I'll Do this Later button that appears on the bottom left side. Google follows up with a pop-up window asking the same question. Click I'll Do this Later again to move on to the next screen.

9. **Decide if you want to include enhanced conversions.**

   If you installed the Google Tag on your website, enable this feature for greater insights on your conversions. If you did not set up your tag, leave this unchecked. Click Agree and Continue to Your Account.

10. **If you have opted out of setting up your Google Tag in the previous steps, click Set Up Your Google Tag Later in the pop-up that appears.**

    Once the page loads, you have now made it to the Google Ads campaign management interface!

11. **Verify the status of your campaign.**

    By default, your campaign will be set to active, but first Google must approve the ad to run on YouTube. Click on the Campaigns dropdown menu from the left side of the page on the Section menu and click the Campaigns link beneath that to check the status of your work (see Figure 12-10).

    On the Campaigns page, you should see a grid with your new ad campaign displayed within it. Looking at the Status column in the reporting grid, you should see the text *Under Review.* That's a good sign. It's proof that your ad is complete — you just need to wait for final approval from Google. Usually, that takes no more than 24 hours. If it's taking any longer, call Google Ads support at 1-800-838-7871 for help with troubleshooting.

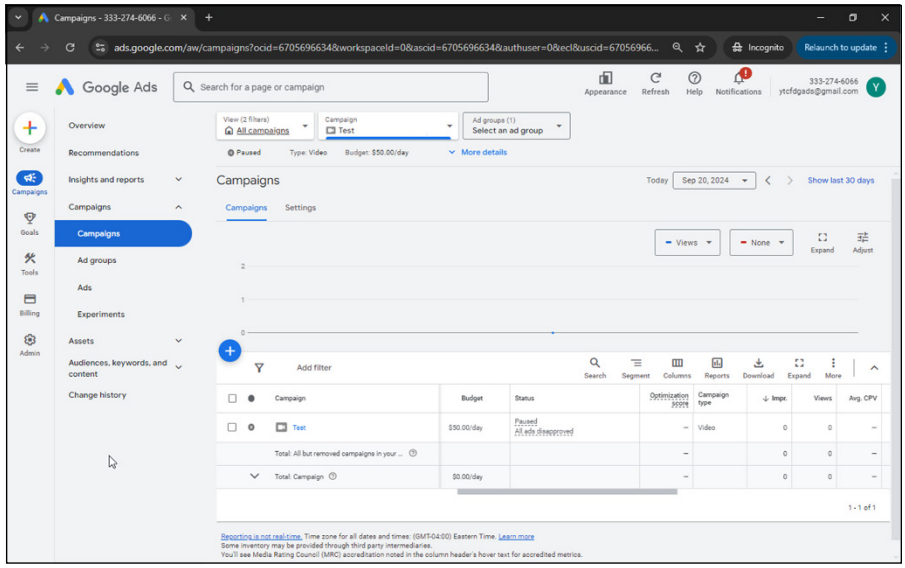

FIGURE 12-10: Google Ads campaign page.

12. Be sure to check out how your ads are performing after they are approved by Google.

Monitor your campaigns regularly to find the most effective videos, targeting groups, and ads, and make small optimizations to improve your performance.

TIP

You can always pause an ad campaign from the Campaigns tab by highlighting the checkbox next to the campaign name, clicking the Edit dropdown menu that appears, and then selecting Pause. We recommend that you never remove an ad, because you can't get it back in case you change your mind.

Looking at your campaign details

After you have created an ad campaign, you should see some (or all) of the following tabs appear on the Section menu (that is, the menu on the left side of the screen) of Google Ads:

- **Overview:** Shows relevant highlights, insights, and metrics about your campaigns to help you quickly digest how your campaigns are performing.
- **Recommendations:** Generates suggestions that can improve your campaign's performance based on your account's history, campaign settings, and trends across Google.
- **Insights and Reports (dropdown):** Shows high-level insights about your campaign's performance, as well as the option to view detailed reporting, such as when and where your ads showed up on YouTube.

- **Campaigns (dropdown):** Shows an overview of the performance of all your campaigns and can also be used to edit and set up new campaigns. The Campaigns submenu link will take you to a page where you can see campaign level reporting. Similarly, if you click the Ad Groups or Ads submenu links, you will see reporting on your campaign at those levels of detail. Review Figure 12-10 for more information.
- **Assets (dropdown):** Lists the videos.
- **Audiences, keywords, and content (-):** Displays the performance metrics of the audiences you're targeting and lets you add or edit your audiences, as well as demographic targeting, location targeting, content targeting, adjusting your ad schedule, and more.

Measuring clicks and results

Regularly tracking the performance of your campaign is essential for success. If you don't pay attention, you may be spending ad dollars for ineffective views, or you might miss out on interesting opportunities to reach your audience. Fortunately, Google Ads gives you all the important numbers you need in order to manage your campaign.

When you analyze your campaign results, it's important to understand the following distinction:

- **Paid metrics:** Represent the direct results of your ads, such as impressions, ad views, and the average cost per view.
- **Earned metrics:** Can be thought of as the follow-on activities that occur as a result of your ads, including new subscribers and additional channel views.

Both sets of metrics are important to advertisers and YouTube channel managers because they tell them whether their ad money is being spent effectively.

REMEMBER

You're charged for paid metrics, not for earned metrics. If your video ad results in a viewer visiting your channel and watching ten more videos, you paid for one view and received ten for free. In other words, that's 11 views for the price of one!

Looking at campaign information

Click the Campaigns tab (within the Campaigns dropdown menu) to see the most important performance numbers for your new campaign.

These are your *paid metrics*. The following list of common metrics describes what the numbers mean:

- **Impressions:** These figures represent how many times your ad was shown to a user (irrespective of whether the user clicked on it or watched it for any certain length of time).
- **Views:** This number shows how many views your videos got by way of paid ads. For video in-feed ads, a view is counted when a viewer clicks on an ad and starts watching the video. For in-stream ads, a view means that the user watched at least 30 seconds of the ad (or the whole ad if it's shorter) or clicked on one of the ad's interactive elements.
- **View rate:** This rate represents the percentage of people who saw your ad and either clicked on it (for video in-feed) or chose not to skip it (for in-stream). Don't be disappointed if this number seems low. Typical rates are well under 1 percent for video in-feed and around 25 to 30 percent for in-stream ads. The higher the number, the more effective your ad.
- **Watch time:** This is the total amount of time that people watched your video ads, in seconds.
- **Average watch time/impression:** This one measures the average number of seconds someone watched your ad per impression of the ad.
- **Average CPV (cost per view):** This figure tells you how much you spent for one person to watch your video. This value can differ depending on the topic and the amount of competition you face, but ranges between 1 cent and 20 cents are typical.
- **Cost:** This is the total amount you spent on all your YouTube ads.

Successful campaigns have a high view rate and a low CPV. But what the numbers should be depends strongly on your industry. Some industries, such as financial services, are highly competitive in their online marketing efforts, so expect a high CPV amount. In other industries, you may be able to draw viewers for only a few cents per pop. For a more detailed description of all the available video ad metrics for Google Ads, visit `https://support.google.com/google-ads/answer/2375431`.

TIP

Watch how your campaign performs over time. When the view rate value drops and the CPV rises, it's time to optimize.

Getting earned metrics

The great part about YouTube advertising is that it can lead to increased viewer activity with your channel. These are *earned metrics*, measured in terms of the past seven days, and they include:

- **Earned views:** The number of new video views that occur from viewers who've seen an ad from your channel.
- **Earned subscribers:** The number of new subscriptions that occur from unsubscribed viewers who've seen an ad from your channel.
- **Earned playlist additions:** The number of playlist additions that occur from viewers who've seen an ad from your channel.
- **Earned likes:** The number of video likes that occur from viewers who've seen an ad from your channel.
- **Earned shares:** The number of video shares that occur from viewers who've seen an ad from your channel.

Earned metrics aren't displayed by default, so you have to select them from the Modify Columns menu. Here's how:

1. **From the Campaigns tab, click the Columns button on the Table toolbar and choose Modify Columns from the menu that appears.**

   You're presented with a Modify Columns screen, like the one shown in Figure 12-11.

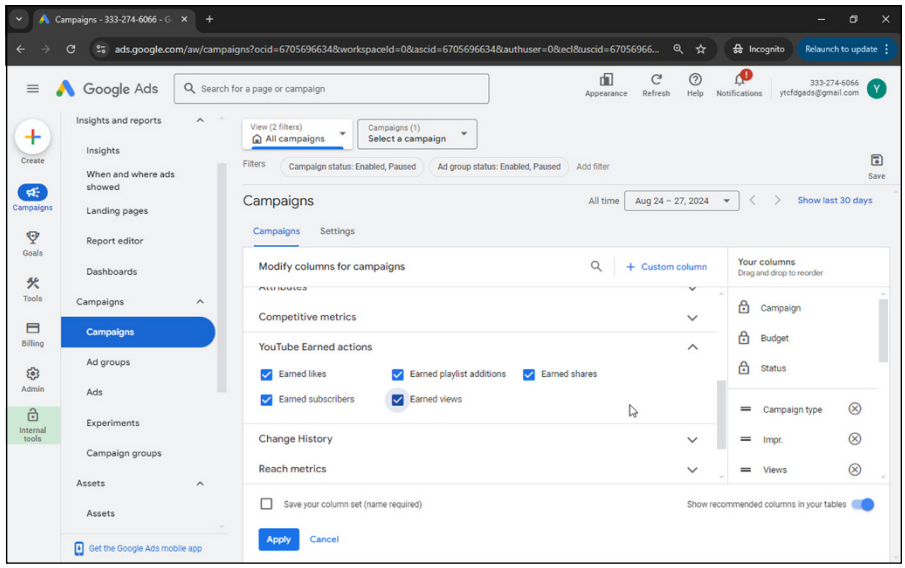

FIGURE 12-11: Adding earned metrics data to the reporting grid.

2. **Choose YouTube Earned Actions from the list of column options displayed.**

3. **From the options that appear, select each of the earned metrics you want to add by selecting the checkbox next to each earned metric.**

4. **Click the Apply button.**

   You now have full access to your earned campaign metrics on the reporting grid.

REMEMBER

This technique can be used for customizing all reporting, including adding and removing other paid metrics.

IN THIS CHAPTER

- Joining the YouTube Partner Program
- Configuring your channel for monetization and making changes to increase ad revenue
- Creating an AdSense account for payment management and ad control
- Understanding how ads work on your channel
- Controlling what ads you allow on your channel
- Adhering to FTC and COPPA regulations

Chapter 13

Earning Money on YouTube: A YPP Overview

If you have an active channel with fabulous content and you excel at social media and community interaction, you have a good shot at making some money from all your hard YouTube work. In YouTube and digital advertising lingo, this is known as *monetization.* If you've read Chapter 12, you know all about how advertisers pay for YouTube advertising. You've probably figured out that the advertising money has to go somewhere. It does — into the hands of Google, your partners, and you: the channel manager/publisher/creator.

You can make money from your YouTube work in many ways:

- **Collecting advertising revenue.** You charge users to view some or all of the content on your channel. Allow display, skippable, and non-skippable video ads on your content.
- **Offering channel membership.** You allow members to pay a monthly fee for special perks you offer.
- **Providing Super Chats and Super Stickers.** You let your fans pay to highlight their messages on your channel's live chat streams.
- **Benefitting from YouTube Premium.** You can even get paid when a YouTube Premium subscriber watches your content (without ads).
- **Selling products.** You create a merchandise shelf where your viewers can buy official branded "merch" directly from your watch pages.
- **Specializing in YouTube Shorts.** YouTube Shorts has a slightly different way for creators to get paid than other videos on your channel. This kind of revenue works on a pooling system, and it is explained later in this chapter.
- **Signing an endorsement deal.** Sponsorship deals work when they're made without too much over-the-top promotion.

You read about monetization in this chapter. Completing the last item in the preceding list means that you've hit the big-time if you're getting six-figure deals to promote products.

REMEMBER

Nothing prevents you from combining some of these various monetization approaches.

Be patient on your monetization journey, though. If you focus on the basics of building your channel with content, discoverability, subscribers, and engagement, the ad revenue you receive will grow in kind. Your YouTube earnings will most likely come from multiple sources.

WARNING

Don't waste your time trying to conjure up a viral video that you hope to monetize. Instead, focus on steady channel and subscriber growth.

Your first step to generating income involves applying for the *YouTube Partner Program (YPP)*, and your second step is connecting all of the AdSense and YouTube plumbing. You can find out more about these topics in the remainder of this chapter.

Partnering with YouTube

Every channel that meets the eligibility requirements can apply to be in the YouTube Partner Program (YPP). You probably want to make money off your YouTube channel, and this is the first step. To be a part of YPP, make sure that you play by the rules and follow all its policies and guidelines for your channel. It's not hard; just make good content that doesn't get flagged for bad behavior, profanity, X-rated material, and basically anything you wouldn't be proud to show your grandma. Just be sure to read the current channel guidelines provided by YouTube regularly, because they are constantly updated.

You must also live in a country or region where YPP is available and have a lot of valid watch-hours on your content — 4,000 hours of watch-time on public videos in the past 12 months (or 10M views of Shorts videos in the last 90 days), to be precise. Perhaps even more difficult to obtain — 1,000 subscribers. Lastly, you need to sign up for an AdSense account. (More on that in the "From Ads to AdSense" section later in this chapter.)

Earning money through YouTube

There are several ways you can earn money once you are in the YPP program, covered in the following sections.

Monetizing your videos

You will start earning money when ads run before and during your content. The next section, "Setting up YouTube monetization" goes in depth on how you can monetize your videos.

Selling memberships

You can allow your users to buy memberships to your channel and give them exclusive access to content. Viewers will be able to join from your channel and video pages. You'll receive 70 percent of net revenue on memberships. To enable this feature, follow these steps:

1. **Sign in to YouTube Studio at `studio.youtube.com`.**
2. **Click on Earn in the left-side menu.**
3. **Select Memberships.**
4. **Next, you need to set up your membership pricing.**

   Once you choose your membership pricing, you need to choose your perks for your fans (what they will have access to, like exclusive content).

After setting this up, it will be reviewed by YouTube before going live on your channel. This can take up to one day. Once it is approved, you will receive an email confirmation, and the membership tab will appear on your channel.

Selling Super Chats and Super Stickers

Fans can buy Super Chats to highlight their messages in live chat, or Super Stickers to get an animated image. This means your fans can purchase chats to get priority comments that get pinned to the top of a comment thread. These features are only available during a livestream. This feature is automatically turned on when the live chat is turned on for your livestream. To turn on live chat, follow these steps:

1. **Sign in to YouTube Studio at `studio.youtube.com`.**
2. **Click Earn in the left-side menu.**
3. **Select Supers.**
4. **Turn Super Chat on.**

Creating a merchandise shelf

You can connect your official merchandise shop to YouTube. You will then have a tab called Shop on your YouTube channel. This means that your fans can buy your products directly from your YouTube channel, whether you are selling from your own retail website or a Shopify site.

To add a merchandise shelf to your YouTube channel, follow these steps:

1. **Sign in to YouTube Studio at `studio.youtube.com`.**
2. **Click Earn in the left-side menu.**
3. **Click the Shopping tab.**

   Note that this tab will appear only after you have been accepted into YPP.
4. **Click Get Started if you haven't already connected YouTube with a Shopping retailer or platform.**

   From here you can link your retail site or Shopify site. You can connect one or multiple stores.

   Once you have connected your store, the Store tab will automatically show up on your YouTube channel. Your fans can click on your products from your YouTube channel.

Joining YouTube Premium

YouTube Premium is a subscription service that allows subscribers to watch YouTube without ads. YouTube shares part of the monthly subscription cost with creators. This revenue will be automatically distributed to you once you are in the YPP. YouTube Premium is covered in more detail later in this chapter.

Following YouTube's policies

After you're a member of YPP, you need to follow all the policies regarding monetization, community guidelines, terms of service, and Google AdSense. Plus, you need to pay close attention to the kind of content you create if you want to maintain an advertiser-friendly environment on your channel. Not to mention, if your content is targeting children, pay extra close attention to Children's Online Privacy Protection Act laws — also known as COPPA laws. (For more on COPPA, check out the "Following the Federal Trade Commission and COPPA guidelines" section, later in this chapter.)

REMEMBER

Don't expect your YPP application to be accepted immediately. After you agree to the terms of service and connect your AdSense account, your channel is reviewed by both a machine and a human to ensure that your content follows all guidelines. You're given the ability to check your application status at any time, but it could take over a month after your channel is reviewed. If you're accepted, you can set up your personal preferences for the types of ads you want on your content and enable monetization on all your uploads.

REMEMBER

Your channel will be rejected if you do not meet all of the criteria for monetization listed in the "Partnering with YouTube" section of this chapter. There are several reasons you may be rejected, such as if you do not have enough subscribers or views, or you broke one of the community guidelines, like using copyrighted content. If you are rejected, you will get an email telling you the specific policies that you did not meet so you can fix this for your next submission.

If you are rejected, you can reapply 30 days after you get your first rejection email. After your second rejection, you can apply 90 days after you get the rejection email.

From Ads to AdSense

Google Ads is *the* way for advertisers to target YouTube and the Google Display network for ad placements. Publishers and creators can control what types of ads are shown against their content.

REMEMBER

Content owners often take a great deal of pride in the content they produce, so it only makes sense that the ads conform to their brands and ensure a good overall experience for their viewers.

Google AdSense is how web content creators and YouTube channel managers control ads and get paid from advertisements that run against their YouTube content and websites. Like Google Ads, AdSense is a huge topic — we don't have room to cover every nook and cranny in this chapter, but we give you a sense of what's necessary to get you started with YouTube monetization. AdSense, like all Google products, evolves regularly. To stay current, check out `https://support.google.com/adsense`.

Setting up YouTube monetization

Before you start seeing any money in your bank account, you need to set up your channel for monetization. You can complete some of these steps before you've been approved for YPP. Here's how it's done:

1. **Go to `www.google.com/adsense/start`.**
2. **On the Google AdSense homepage, click the Sign Up button.**
3. **On the new page that appears, choose an account from your signed in Google Accounts or choose Use Another Account.**
4. **The next page requires you to fill in your website information.**

   Accept the terms and conditions (if you choose to accept after reading).
5. **Click Start Using AdSense to continue.**
6. **You are now in Google AdSense (see Figure 13-1). Click the Enter Information button to choose an individual or business account.**

   Choose Individual if you don't have a business bank account from the list of options. Enter your address and phone number and click Submit.
7. **Start working on the Payments section.**

   After you earn your first $100, you have to manage your payment methods by adding a bank account and then verify your bank account and your billing address. This setup can take, in total, up to a couple weeks (See Figure 13-1.)

TIP

   All AdSense payments are delivered 21 days after the month being paid out has ended.
8. **(Optional) You can add multiple YouTube channels to a single AdSense account. Once you're logged in to your AdSense account, select Sites in the left menu and choose New Site from the menu that appears.**

   You can add your new channel URL in the new window that opens.

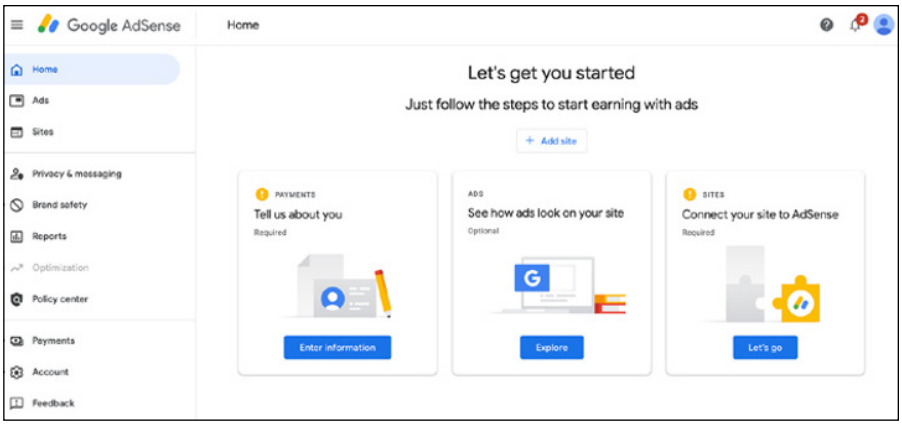

FIGURE 13-1: The Google AdSense setup window.

9. **To finish the process, you need to continue in YouTube.**

   Note: You can't go any further until you're officially accepted into the YPP program.

After you're accepted into the YPP, complete these steps:

1. **On your YouTube page, click your channel's icon and then choose YouTube Studio from the menu that appears.**

   Doing so brings up the YouTube Studio dashboard.

2. **Click the Channel item on the Navigation menu on the left side.**

REMEMBER

If your channel doesn't (yet) meet the minimum eligibility requirements for YPP, use the Earn link from the menu to access a dashboard that shows you how many more subscribers and public watch-hours you need to apply.

3a. **To monetize individual videos:**

   i. *Using YouTube Studio's Videos tab, click to select a particular video and then choose Monetization from the menu that appears.*

      You can now choose the types of ads you want to run on that individual video.

   ii. *Choose the type of ads you want to run and then click Save.*

      You can choose the type of ads (display, skippable, and non-skippable) as well as the location of the ad — before video (pre-roll), during video (mid-roll), and after video (post-roll). For videos longer than eight minutes, you can manage where mid-roll ads occur during your video.

3b. **To enable multiple videos for monetization:**

   i. *Using YouTube Studio's Videos tab, click on Multiple Videos to edit monetization settings in bulk.*

ii. *Choose to update the type of ads and the location of ads you want to run and then click Update Videos.*

TIP

You can always monetize your entire channel from the YouTube Studio Settings. Select Upload Defaults and then click the Monetization tab (see Figure 13-2). You can then set your upload defaults for all future videos.

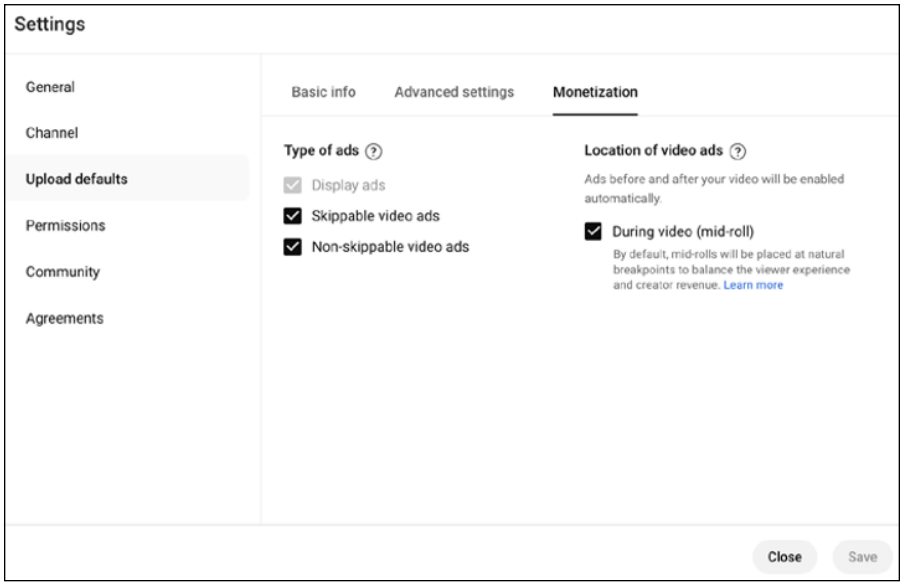

FIGURE 13-2: The YouTube Studio Monetization settings.

NOT EVERYTHING IS MONETIZABLE

If you're at all familiar with the ways of YouTube, you probably have already figured out that you can't just grab a copy of Harry Styles' "Lights Up" video, modify it slightly, and put it on your channel. Sure, everyone would love a few billion monetized views, but in the end, it all comes down to content ownership and copyright. To monetize anything, you need to own the rights to both the audio and visual components of the content. You also have to be careful about some of the visual elements, such as logos and other graphics, which may also be protected by the rights holders.

YouTube keeps tabs on copyrighted content with a feature it calls *Content ID,* a database of files that YouTube uses to compare copyrighted content against new content being

uploaded to the site. Content ID can be used to make claims against your content, which may affect your ability to monetize. Note that with Content ID, the rights holder may choose to monetize *your* content.

Copyright is a tricky topic, and you can read more about it in Chapter 16. You can also check out `https://support.google.com` to find out more about the partner program, monetization, and copyright. When in doubt, consult with a lawyer or watch a YouTube video on the subject — assuming that it's not blocked by copyright, of course.

Analyzing ad performance with YouTube Analytics

You can view your revenue analytics in your AdSense account or from your YouTube channel. That way, you can get detailed information about your earnings that will help you make adjustments to your content and monetization strategy. The good part is that you can get lots of this information directly from YouTube Analytics, with helpful tips and premade reports. The ad performance data visualizations are easy to digest.

Here's how to navigate to your channel's analytics page:

1. **Log in to your YouTube account.**
2. **Click your channel's icon or your Google user icon in the top right, and then choose YouTube Studio from the dropdown menu that appears.**

   Doing so brings up the Channel dashboard.
3. **Choose the Analytics item from the Navigation menu on the left.**

   By default, you should go directly to the Overview submenu.
4. **On the Channel Analytics Navigation tab, click the Revenue tab, where you can analyze your revenue.**

   See the next section for more on revenue issues.

REMEMBER

YouTube Analytics is your go-to resource when you want to find out how your channel is performing with your audience. Chapter 10 gives you the tools to understand your whole YouTube audience story; this chapter concentrates on how YouTube Analytics can help you figure out your ad-and-earnings performances.

Getting your YouTube revenue information

In YouTube Analytics, the section called Revenue is a vital resource for channel managers responsible for monetization. Within the Revenue section, you'll find many important metrics worth analyzing. The default topline metrics you can view by any duration of time requested include:

- **Your estimated revenue:** Estimated net revenue from Google-sold ads.
- **Estimated monetized playbacks:** Counts the ad impressions served on your content, or impressions served that caused a viewer to abandon the video because of a non-skippable ad.
- **Playback-based CPM:** The gross revenue per 1,000 playbacks where ads were shown. This doesn't show you what the advertiser ended up paying for. CPM — technically *cost per mille*, where "*mille*" is the Latin word for "thousand" — is a common measurement used in the advertising industry.

REMEMBER

You can have multiple impressions (*impressions* are the number of times an ad is presented to a viewer) per playback. If a viewer is served a *TrueView in-stream pre-roll ad* (a skippable video ad that runs before your YouTube video), a *display ad* (an image ad that runs on the right rail of YouTube), and an *in-video overlay* (a banner ad that displays on top of your video), it counts as three impressions, not one.

Seeing which metrics are offered

YouTube Analytics is truly robust. Looking at only the Revenue tab, here are some of the other default reports you can use to monitor revenue:

- **Estimated Revenue Over Time:** A graph showing revenue accrued during the selected time period.
- **How Much You're Earning:** Covers the last six months of your channel's estimated revenue.
- **Content Performance:** Highlights the videos that made the most money in the chosen timeframe.
- **How You Make Money:** Covers how your channel actually made money in the chosen timeframe. This shows you which ad types were served on your content. This is especially helpful because you won't see all the ad types just by watching your own video content due to targeting parameters set up by advertisers.

Earning YouTube Shorts Revenue

YouTube Shorts are short (less than three minutes) vertical videos that are mostly watched in a continuous feed. YouTube Shorts are similar to Instagram reels and TikTok videos. Because these videos appear in a feed environment one after the other, the monetization of these videos is different than normal pre-roll videos.

The first step in making money on your Shorts videos is to accept the Shorts Monetization Module — terms that let you earn from ads and YouTube Premium in the Shorts feed. To do this, follow these steps:

1. **Sign in to YouTube Studio at `studio.youtube.com`.**
2. **Click on Earn from the left side menu.**
3. **Click on Get Started in the Shorts Monetization module.**

   This will show you the terms and service of shorts monetization. Be sure to review this information.
4. **After reviewing the Terms, click accept.**

REMEMBER

Shorts ad revenue sharing applies to your channel's eligible Shorts views starting on the date you accept the module. Shorts views accrued prior to accepting the Shorts Monetization Module are not eligible.

Shorts revenue works on a pooling system since the videos are served in a feed and not on your Watch page. Creators are paid based on the number of views in the overall creator pool. For example, if you got 5 percent of overall views, you would earn 5 percent of the revenue to creators (this might seem complicated, but it makes sense once you're using it). The overall review is added and then split between creators and musicians (when music is featured in the video). Here's how the process works:

1. **Revenue from all ads running between videos in the Shorts Feed is added.**
2. **That money is used to reward the creators who got views and to reward musicians for their music on those videos.**

   For example, if the creator has a hit video featuring Taylor Swift music, the creator splits the revenue with Taylor Swift. If the video does not have any music, the content creator gets all the revenue.

REMEMBER

If you're not seeing performance data for a specific ad type, go back and make sure you have monetization turned on and all ad types enabled. You can find out more about configuring the monetization of existing videos in the "Setting up YouTube monetization" section in this chapter.

TIP

Whenever you look at your analytics reports, keep an eye out for events that stand out in the charts — such as peaks or valleys in the data — to determine what's working well and what may need improvement.

Making Changes to Your Video Strategy Based on the Data

The Revenue reports can help you increase your revenue stream only if you're agile in your video strategy. Advertisers are more likely to want to advertise on your videos if the content is in line with their branding and company image. You should make authentic content and not worry about advertisers for the most part, but if you're making content about obscure or radical topics, you may be alienating your potential advertisers.

YouTube has rolled out helpful guides to demystify the placements advertisers are looking for in running their ads. You can see all the advertiser-friendly guidelines at `https://support.google.com/youtube/answer/6162278`.

If you have hundreds of videos but only a handful of them are making any revenue, it might be time to make some changes to your video content strategy. To find out why the few videos are working, consider these questions:

- When monetizing the content, did you allow all ad types? Perhaps you need to update your monetization preferences across your channel.
- Are the videos vastly different from the others? Are they funny, but the rest of your content isn't?
- Did you have a guest speaker onscreen with you who might have a deal with sponsors or be vastly more popular?
- Do the underperforming videos meet the advertiser-friendly guidelines that help you stay in good standing? (We tell you more about those guidelines later in this chapter.)
- Are the title, tags, and descriptions for these successful videos more accurate?

OTHER WAYS TO MAKE MONEY FROM YOUR CHANNEL

If you're just starting your YouTube channel and hoping to make some money so that you can create more content or do something fabulous, it might be hard to earn the revenue you need from your channel if you don't meet the YPP minimums yet, or you're just getting off the ground. Consider trying crowdfunding using sites like Kickstarter, GoFundMe, and Patreon. You can also try for brand sponsorships. If you're good at a sport, think about brands like Red Bull, which sponsor athletes and sometimes even feature their video content. Name-dropping your favorite products in your videos can also help you land sponsorship deals. Some companies will even help match your content.

- Do the successful videos have the best practice thumbnails, a face in the thumbnail, and/or larger text?
- Are the best-performing videos directed at children or adults?

Preventing Strikes Against Your Account

There are community guideline strikes and copyright strikes. They are handled differently by YouTube. A partner in good standing has very few or no strikes. If you receive a community guideline strike, you're notified by email specifying the reason for the strike and the next steps you can take. As in baseball, draw three strikes and you're out. To avoid this situation, follow the community guidelines at `www.youtube.com/about/policies/#community-guidelines`.

If you get a copyright strike, it means that the legal owner of the content you posted has requested that YouTube take it down. Sometimes, this can be a mistake and YouTube corrects it, but if you did, in fact, illegally upload someone else's content, you will get a strike. The first strike requires you to complete YouTube's copyright school. Subsequent strikes will start to strip away your ability to monetize, livestream, and more.

WARNING

Avoid using copyrighted material or breaking the rules in the community guidelines in order to continue to monetize your content. If you do break the rules, you may have your channel disabled, and the ability to create new channels will be disallowed.

REMAINING IN GOOD STANDING

If you're a YouTube partner in good standing, try to stay that way. The best way to think about your content is to focus on a video content strategy that you feel passionate about. Keep in mind that you need to appeal to advertisers along the way, to ensure your continued stream of ad revenue. The good news is that following the YouTube Partner Program advertiser-friendly content guidelines can help you do just that (see `https://support.google.com/youtube`). Here are some of the content types you should stay clear of:

- Inappropriate language
- Violence
- Adult content
- Harmful or dangerous acts
- Hateful content
- Incendiary or demeaning content
- Recreational drugs or drug-related content
- Tobacco-related content
- Controversial issues and sensitive events
- Adult themes in family content

Considering brand safety and suitability

Brand safety and suitability have been issues since the beginning of radio and TV advertising. A brand advertiser doesn't want its brand to be associated with content that isn't in line with its vision and mission. For instance, you might be making content that's in accordance with the community guidelines about animal testing in the beauty industry, but even a beauty brand that doesn't test its products on animals won't want to run ads on your video. They're afraid that viewers will negatively associate their brand with the topic of animal testing. Some types of content are safe enough to run an ad on, but may not be suitable for the brand.

When creating your channel content strategy, research channels that are similar to yours to see what kinds of ads appear on their content. This is a good indication of what you can expect.

Controlling which ads you allow on your channel

On the other side of things, you can also control what ads you allow on your YouTube channel from your AdSense account. You may be running a channel where having certain brand advertising may be inappropriate and you can control who can run their ads on your channel. By default, alcohol and gambling are set to not appear on your channel — you have to choose to include them.

For example, if you are running a children's nursery rhyme channel, you may want to stay away from any advertisers that are more appropriate for adults.

To access these controls, follow these steps:

1. **Log in to your AdSense account.**
2. **Click on Brand Safety on the left navigation.**
3. **Click Content and then Blocking Controls.**

   The screen shown in Figure 13-3 will open.
4. **Select Manage Sensitive Categories.**

   The screen shown in Figure 13-4 will open.
5. **Now, select certain categories, such as Weight Loss, Religion, or Sexual Reproductive Health that you decide are not appropriate for your channel.**

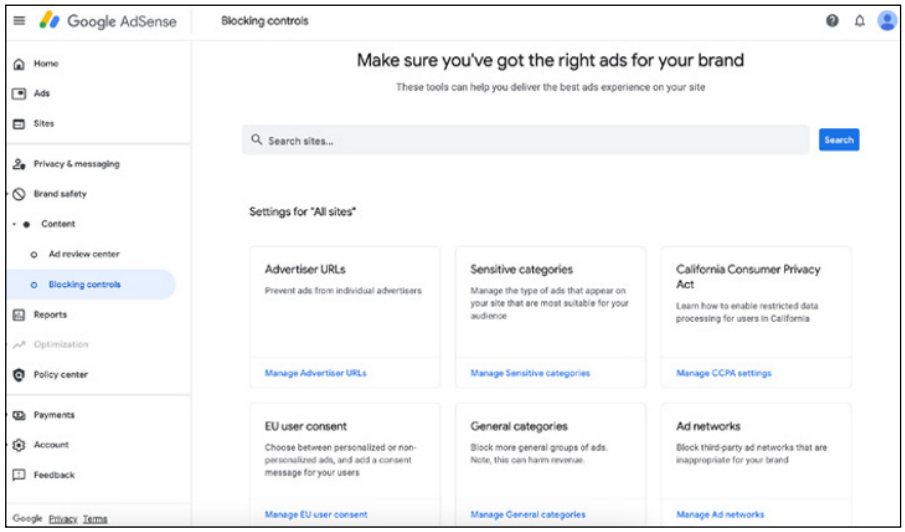

FIGURE 13-3: The Blocking Controls screen.

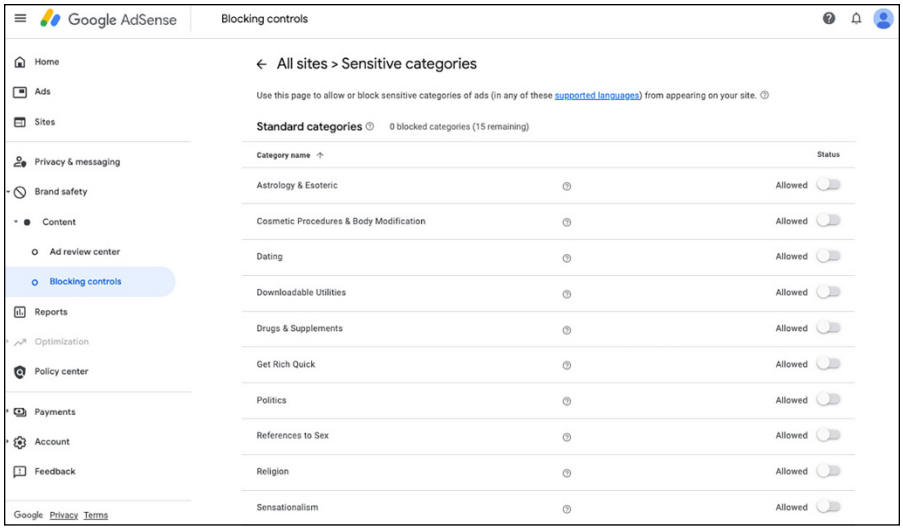

FIGURE 13-4: The Sensitive Categories screen.

Following the Federal Trade Commission and COPPA guidelines

In September 2019, the Federal Trade Commission (FTC) imposed a historic fine of $170 million on YouTube for alleged violations of child privacy laws. Many changes have now been rolled out for creators to comply with the ruling. As a creator, you need to either label your entire channel as content directed at children or identify the specific videos on your channel that are directed at children.

Several gray areas exist here — like gaming, toy reviews, and family vlogging — that are difficult to manage, because they may target kids and adults. The FTC now requires that YouTube must treat anyone watching primarily child-directed content as children under 13 years old. Product features, such as comments, are disabled for content created for children. Content labeled for children also has different advertising opportunities and may, in turn, create different trends in your revenue stream.

WARNING

The FTC now holds *creators* liable for future violations, so be sure to carefully label your content designated for children or not. If they find that you have mislabeled your content, you could be fined.

To learn more about how the FCC is handling YouTube channels, check out this blog post:

```
www.ftc.gov/news-events/blogs/business-blog/2019/11/
  youtube-channel-owners-your-content-directed-children
```

Or visit the FTC's page regarding the Children's Online Privacy Protection Act (COPPA):

```
www.ftc.gov/tips-advice/business-center/privacy-and-security/
  children%27s-privacy
```

REMEMBER

When deciding whether your content might be seen as directed at children (under 13 years of age), consider these nine qualifying questions:

- Does the subject matter in the video appeal to children?
- Is the thumbnail or video content something that would attract children?
- Does the video have animated characters or child-oriented activities?
- Is the music used in the video or other audio tracks something children might like?
- Are the actors or subjects of the video children?
- Does the video have any child celebrities or creators who appeal to children?
- Does the language used in the video or on your surrounding channel target children?
- Does the video feature any sponsorships that would appeal to children?
- Are the video's titles, tags, or descriptions appealing to children?

If you answer yes to any of these questions, your content could be seen as directed at children, which means you need to properly label your videos or channel as made for kids.

IN THIS CHAPTER

- Learning about artificial intelligence (AI) and GenAI (generative AI)
- Exploring YouTube's AI tools
- Accessing GenAI
- Using GenAI for content creation
- Using GenAI for channel management tasks
- Using AI responsibly

Chapter 14

Using AI to Supercharge Your YouTube Channel

Alright, future YouTube sensation, it's time to unleash your inner Spielberg! But hold on – before you grab that camera, let's talk about your secret weapon: generative AI. Yep, that's right, we're about to dive headfirst into the world of artificial intelligence and how it can supercharge your YouTube channel.

Think of generative AI as your personal YouTube sidekick, always ready to lend a helping hand. Need a catchy title or description that'll make viewers click? AI's got your back. Stumped on video ideas? No worries, AI can brainstorm a whole bunch for you. Even editing, that sometimes tedious task, can get a whole lot easier with AI's help.

In this chapter, we break down the basics of generative AI and show you how to use it to create killer content that'll leave your audience wanting more. Get ready to discover how AI can save you time, boost your creativity, and take your YouTube channel to the next level. It's like having a team of experts working behind the scenes, all while you focus on what you do best – being the awesome YouTuber you were born to be!

What a great introduction to this chapter, and . . . it was written by AI (Google Gemini, to be exact)! All we had to do was give the "generative AI" a "prompt" (a fancy word for instructions), and it wrote this in less than two seconds. Now you can have access to the same tools to help with your YouTube channel (and your grocery shopping list).

This chapter covers the AI tools that YouTube has developed for creators, as well as some tools outside of YouTube that can help supercharge your YouTube channel.

Defining AI and GenAI

Most people have heard the terms *AI* and *GenAI* in the news over the last few years. But, what do they mean exactly? And how can they help you make a better YouTube channel?

AI stands for Artificial Intelligence. This might sound scary, but we use this term to define computers that can make decisions like humans. Don't worry, they are not yet smart enough to take over the world, but they are smart enough to help you with some of your daily tasks. AI is the broadest term, and there are many technologies that fall under the AI umbrella, including Generative AI. AI is how your Amazon Alexa can understand your voice and talk back, how self-driving cars work, and how Netflix can suggest movies you may like. See, not that scary! These tools use very large datasets of information and learn patterns from it that they can replicate for the benefit of their users.

GenAI stands for Generative AI. It is a type of AI that can *generate* something new. Yes, that means that GenAI can create something new that has never been created before! GenAI can write poems and songs, create images, and suggest new ideas for YouTube videos. You may have heard of some of the new GenAI tools that have made a big splash over the last few years, such as OpenAI's ChatGPT or Google's Gemini tools.

So, why should you care as a YouTube channel owner? Because there are many free public AI tools that can help you with the difficult tasks of building a YouTube channel. AI can help automate some of the tasks that you don't like and can become a helpful computer assistant to you. Also, YouTube realizes how important AI is for content creation and has created specific tools for YouTube creators. Those very tools are the topic of this chapter.

Learning About YouTube's AI Tools

In 2023, YouTube announced several important AI features for YouTube creators. These tools center around how YouTube creators can make things simpler using AI. The first tool is called *YouTube Create,* which is a new mobile application that makes it easier to create mobile videos for YouTube. The second tool, *Aloud*, helps you create subtitles in any language. The last tool Google (as a reminder, YouTube is owned by Google) announced was YouTube Dream Screen, which helps create fun YouTube Shorts.

The following sections break down YouTube's AI tools.

YouTube Create

YouTube Create is an AI-driven app for YouTube creators. This free app is built specifically for mobile creators to make the process of video creation easier. YouTube Create allows you to turn your phone into a top-notch video production studio as you can tap into Google's tools filled with things like royalty-free music, filters, and video effects. As of the writing of this book, this tool is currently in beta in select markets on Android. To use and access the tool, you can simply download the application on your Android phone (if it's available in your area).

Automatic dubbing with Aloud

One way creators look to expand their audiences is through accessing audiences who speak different languages than their own. To do this, creators use tools to dub their content into other languages. But not all creators have the resources to dub their content professionally, so Google created this tool, which can help you expand your audience. This is a great way to start marketing your YouTube channel as a global business!

WARNING

As of the writing of this book, this tool is currently in beta.

To add a dubbed audio track to your video, follow these steps:

1. **Sign in to YouTube Studio on your computer.**
2. **From the left menu, select Subtitles.**
3. **Click the video that you want to add an audio track to.**

4. **Click Add Language and select the appropriate language.**
5. **Under Audio, click Add.**
6. **Click Select File.**
7. **Choose which file to upload.**

   Files must be in a supported audio-only file format and be about the same length as your video. As always, try to use a high-quality audio and an original format from your content library. Supported formats include MP3 audio in MP3/WAC container, PCM audio in WAV container, AAC audio in MOV container, and FLAC audio.
8. **Click Publish when you're ready to upload your audio track.**

YouTube Dream Screen

One of the most important new video formats on YouTube is YouTube Shorts. YouTube created an AI-driven app that allows you to create content from using natural language prompts. YouTube Dream Screen can help you make more engaging Shorts content by turning your words into a green screen background, or generate unique images or videos based on your prompts. Imagine if you could type something into your search bar and it turned into a video or image. That is what Google is starting to build with Dream Screen. Similar to other AI tools, such as ChatGPT and Gemini, Dream Screen will take a prompt and create an image or video from your ideas.

Note: As of the writing of this book, you can only enter text prompts in English. Feature availability may vary based on your location and depending on the stage of the experiment.

To access Dream Screen, follow these steps:

1. **Open the YouTube application.**
2. **Click the Create button.**
3. **From the right menu, click Green Screen.**
4. **From the bottom, select (+) Create an Image or Video.**
5. **Describe the content you want to generate.**
6. **Click Create Preview.**

7. **Select and post your video:**
    - **For images:** Choose a generated image and use the image as a green screen background to record over it.
    - **For video:** Use the generated video as a green screen and record yourself along with it.
8. **(Optional) You can add details to your video, such as a description, and set the privacy settings.**
9. **Click Upload Short to publish your video.**

Using Other AI Tools for YouTube Content Creation

Outside of YouTube's out-of-the-box AI tools, there are also free tools available online to help you expand your YouTube following. There are dozens of tools available, but this chapter focuses on the top two tools available as of the writing of this book:

- Google Gemini (`https://gemini.google.com`)
- OpenAI ChatGPT (`https://chatgpt.com/`)

Both of these tools have paid and free versions, but all of the information described here uses the free versions. Since Google owns YouTube, we focused on using the Google tool, Gemini, in the examples in this chapter. However, you can test out what works best for you and experiment with different tools.

Gemini and ChatGPT are similar. From their websites, you will see a place in the bottom to type your *prompt* (see Figure 14-1), which is where you ask your question.

Start by testing some simple questions and then keep asking follow-up questions. These tools remember your first question as you ask a second one. Try starting with simple requests to get used to the workflow, such as what you should make for dinner (see Figure 14-2)! You can add follow-up questions to refine or add to your query (see Figure 14-3).

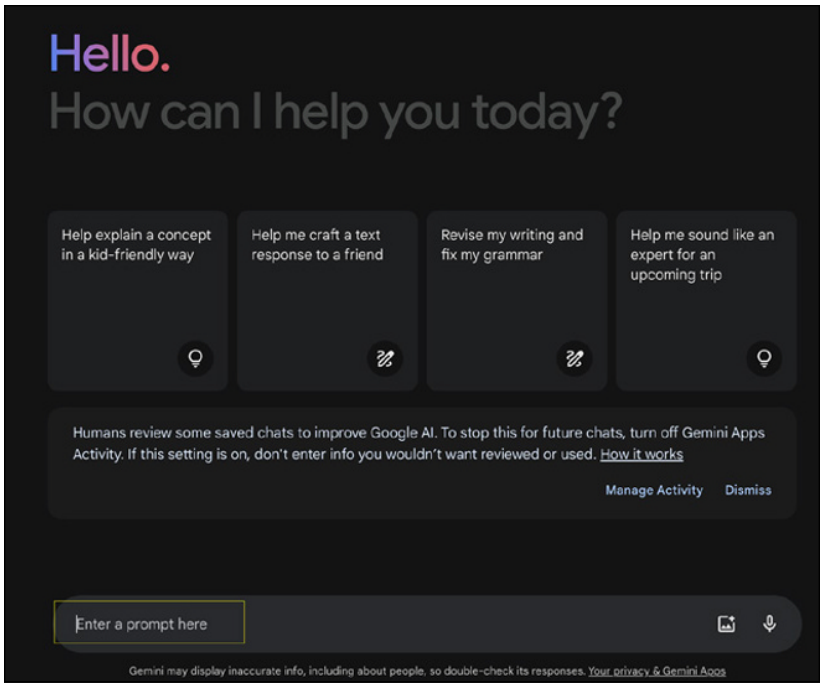

FIGURE 14-1: Gemini prompt (`https://gemini.google.com`).

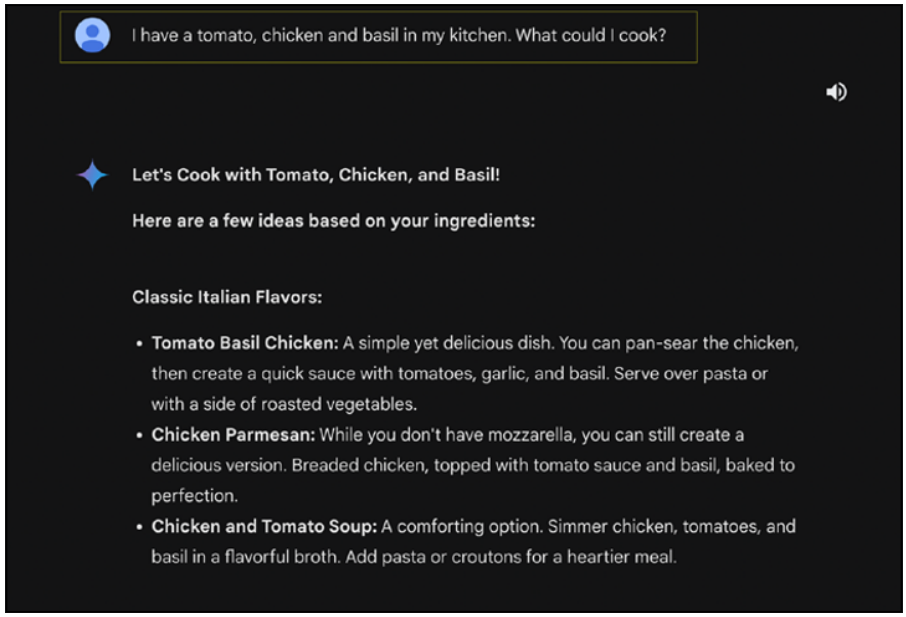

FIGURE 14-2: Gemini recipe prompt and answer.

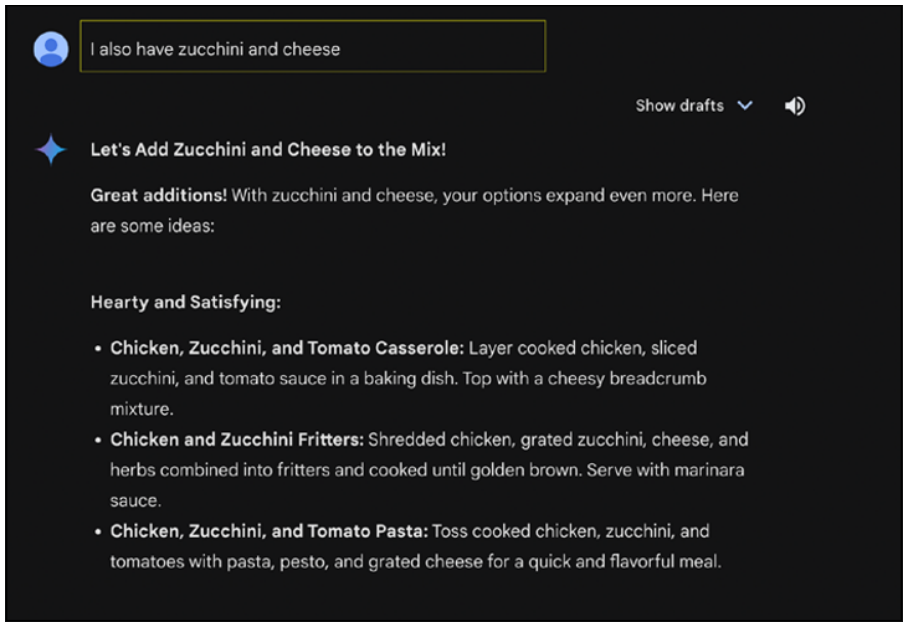

FIGURE 14-3: Gemini second recipe prompt.

Writing your prompt

The best way to get the most out of generative AI is to make sure your prompts are easy for the generative AI tools to understand. You should interact with the tools using natural language, as if you are asking a friend a question. If you were speaking to a friend, you would most likely speak in full sentences, provide context, and be clear and concise. Working with AI is very similar. A best practice is to remember these four actions when creating your prompt:

- Define your persona
- Set your goals
- Be specific
- Include restraints

Here is an example prompt:

> *I am a Boston luxury real estate agent who focuses on luxury sales in the Boston area, and I am trying to build a successful YouTube channel to get a loyal following. Can you create a detailed content calendar starting in September to help me plan my video content strategy? I have time to post 1 or 2 videos per week.*

This prompt works well because it addresses the four main actions:

- **Define your persona:** I am a Boston luxury real estate agent who focuses on luxury sales in the Boston area.
- **Set your goals:** I am trying to build a successful YouTube channel to get a loyal following.
- **Be specific:** Can you create a detailed content calendar starting in September to help me plan my video content strategy?
- **Include restraints:** I have time to post 1 or 2 videos per week.

TIP

Ask follow-ups and make it conversational. If you do not get what you want on the first pass, it is okay to ask a follow-up question or clarify. Remember that you are not dealing with a person, so you can continue to ask as many questions as you want. You can't annoy the AI! This is one of the great things about working with AI — you can continue to ask it similar questions and follow-ups without any risk of annoying a human. You can even say, "give me a different answer" or "try again" to try and get closer to the answer you are looking for. This can feel funny at first, as we are not used to interacting with people this way, but it is okay (and helpful) to do so when working with AI.

Creating content using GenAI features on YouTube

Now that you know the basics about writing prompts, this section shows how you can write a request for a YouTube content calendar. Let's see what you get in response. Creating a content calendar is an important part of creating a new YouTube channel, and now AI can help you stay on pace. (For more on content calendar planning, see Chapter 9.)

REMEMBER

Generative AI will most likely give you different answers every time you ask a question. You can use this to your advantage if you are trying to get a different answer, but this can also be frustrating if you are trying to go back to an old answer. If you like a particular answer it gives you, it might be wise to save that information somewhere on your desktop/laptop/mobile.

Also, you will not get the exact answer in the following section, but instead something more tailored to your interactions.

Content calendar example 1 (Create a content calendar)

This example entered this prompt into Gemini: I am a Boston luxury real estate agent who focuses on luxury sales in the Boston area, and I am trying to build a successful YouTube channel to get a loyal following. Can you create a detailed content calendar starting in September to help me plan my video content strategy? I have time to post 1 or 2 videos per week.

Here is the response:

September

- *Week 1:*
  - ***Monday:*** *"Top 5 Luxury Amenities in Boston Condos" — Focus on amenities that differentiate luxury properties.*
  - ***Wednesday:*** *"Behind the Scenes: A Day in the Life of a Boston Luxury Real Estate Agent" — Give viewers a peek into your daily routine.*
- *Week 2:*
  - ***Monday:*** *"Luxury Living in Back Bay: A Neighborhood Spotlight" — Highlight the unique features and appeal of Back Bay.*
  - ***Wednesday:*** *"Client Testimonial: Why They Chose [Your Name] as Their Agent" — Showcase a satisfied client's experience.*
- *Week 3:*
  - ***Monday:*** *"Investing in Boston Luxury Real Estate: Market Trends and Opportunities" — Share insights into the investment potential of luxury properties.*
  - ***Wednesday:*** *"Exclusive Property Tour: Waterfront Penthouse with Stunning Views" — Showcase a high-end property with virtual tour elements.*
- *Week 4:*
  - ***Monday****: "Luxury Kitchen Design Trends: Elevate Your Home" — Explore the latest kitchen design trends for luxury homes.*
  - ***Wednesday****: "Relocating to Boston? Discover the Best Luxury Suburbs" — Highlight the appeal of luxury suburban living in Boston.*

Additional content ideas:

- *Interviews with interior designers, architects, and luxury lifestyle experts*
- *Virtual property tours of your listings*
- *Market reports and analysis*
- *Luxury home staging tips*
- *Home maintenance and upkeep for luxury properties*
- *Exclusive events and open houses*
- *Collaborations with local luxury brands*

You can see that the AI did a great job giving me ideas for my content calendar. I can take those ideas and combine them with my current content calendar. I can also ask follow-up questions to AI and get more ideas. Remember to keep it conversational with AI.

REMEMBER

It's okay to tell AI that you don't like these ideas, give me ten more!

Content calendar example 2 (Create content ideas)

Here is another example prompt:

> *I am an astronomer who wants to share basic facts about the universe with the world, and I am trying to build a successful YouTube channel to get a high number of subscribers. Can you create ten ideas for videos I could create for my YouTube channel?*

This prompt works well because it addresses the four main actions:

- **Define your persona**: I am an astronomer who wants to share basic facts about the universe with the world.
- **Set your goals**: I am trying to build a successful YouTube channel to get a high number of subscribers.
- **Be specific:** Can you create ten ideas for videos I could create for my YouTube channel?
- **Use constraints:** If you need to keep your video titles to a specific character limit, make sure to include that restraint in your promotes. For example, "Write me a video title in 100 characters or less."

REMEMBER

This is a best practice and may not apply to every prompt. If you are asking a simple question, you may not need to "Define your persona" for example. This is just a guideline for you to begin your prompting journey. As you get more familiar with AI and using prompts, you will learn what works best for your use case.

TIP

When using AI, avoid leading questions. Leading questions can bias some responses, so try to ask questions as if you were questioning someone on trial. No leading the witness!

Here are the results:

Absolutely! Here are ten video ideas tailored for an astronomer's YouTube channel, aiming for broad appeal and subscriber growth:

1. *The Scale of the Universe: Mind-Blowing Visual Comparisons*

   Use stunning visuals and relatable analogies to showcase the sheer size of planets, stars, galaxies, and the observable universe.

2. *Black Holes: Fact vs. Fiction – What Hollywood Gets Wrong*

   Debunk common misconceptions about black holes, explaining their true nature, formation, and effects on space-time.

3. *The Life Cycle of Stars: From Birth to Supernova (and Beyond)*

   Create a captivating animation to illustrate the different stages of a star's life, including dramatic events like supernovae and the creation of neutron stars or black holes.

4. *Exoplanets: The Hunt for Earth 2.0 – Are We Alone?*

   Dive into the exciting field of exoplanet research, showcasing the methods used to detect them and discussing the possibility of finding habitable worlds.

5. *The Big Bang: The Beginning of Everything (or Was It?)*

   Explain the leading theory of the universe's origin, highlighting evidence like cosmic microwave background radiation and the expansion of the universe.

6. *Constellations and Mythology: Stories Written in the Stars*

   Explore the cultural significance of constellations, sharing the myths and legends associated with them from various civilizations.

7. *Telescopes: How They Work & How to Choose Your First One*

   Offer a beginner's guide to telescopes, explaining different types, how they function, and tips for amateur astronomers looking to purchase one.

8. *Q&A with an Astronomer: Ask Me Anything About the Universe*

   Host a live session where viewers can ask questions about astronomy, space exploration, or any burning cosmic curiosities they have.

9. *The Northern Lights (Aurora Borealis): Nature's Light Show Explained*

   Delve into the science behind the mesmerizing aurora borealis, explaining how solar particles interact with Earth's atmosphere to create this spectacle.

10. *Monthly Skywatching Guide: What to See in the Night Sky*

    Provide a regular series highlighting celestial events like meteor showers, planetary alignments, or visible constellations, encouraging viewers to explore the night sky.

TIP

Consider collaborating with other YouTubers in the science or education space to cross-promote each other's channels and reach wider audiences.

Using AI for Channel Management Tasks

Another important part of your YouTube channel is making it discoverable to your audience. (See Chapter 7 for more information on search engine optimization.) AI is very good at writing copy for the titles and descriptions of each of your videos. This can help you get ideas and strengthen the discoverability of your videos.

Channel management: Example #1 (Video SEO)

Here is an example prompt (remembering the best practices to get the most out of AI using prompts that define your persona, set goals, and include specific actions).

I am a local luxury real estate agent, and I just created a YouTube video about moving to the Boston, Massachusetts area. Write a title and description of my YouTube video, optimizing for discoverability for my audience. In the video I detail local restaurants and bars, top businesses in the area, and I give an overview of the real estate market.

- **Define your persona:** I am a local luxury real estate agent.
- **Set your goals:** Write a title and description of my YouTube video, optimizing for discoverability for my audience.

- **Be specific:** In the video I detail local restaurants and bars, top businesses in the area, and I give an overview of the real estate market.

Here are the results from Google Gemini:

Title options:

- *Luxury Living in Boston: Your Ultimate Guide to Fine Dining, Top Businesses, and the Real Estate Market*
- *Moving to Boston? Inside Scoop on Luxury Real Estate, Michelin-Star Restaurants & Exclusive Experiences*
- *Boston Luxury Real Estate: Where to Live, Dine, and Invest in 2024 and Beyond*
- *Unlocking Boston's Luxury Lifestyle: A Real Estate Agent's Insider Guide*
- *Boston Luxury Real Estate Market Unveiled: A Local Expert's Tour of Homes, Hotspots & Hidden Gems*

Description Options:

Option 1: Comprehensive and Keyword-Rich

Thinking of relocating to the Boston area and want the inside scoop on luxury living? Join me, a local luxury real estate agent, as I take you on a virtual tour of Boston's most exclusive neighborhoods, Michelin-starred restaurants, high-end shopping destinations, and top businesses. Get an insider's perspective on the current luxury real estate market, including insights on where to buy, what to expect, and how to navigate the process. Whether you're a discerning homebuyer, a business owner, or simply someone who appreciates the finer things in life, this video is your ultimate guide to experiencing luxury in Boston.

Option 2: Short, Sweet, and Enticing

Boston's calling! Discover the city's hidden luxury gems with a local real estate expert. We'll explore upscale neighborhoods, award-winning restaurants, and insider tips on the real estate market. This is your passport to the Boston luxury lifestyle.

Hashtags:

#BostonLuxuryRealEstate #LuxuryLiving #BostonRealEstate #BostonHomes #BostonLuxury #RelocateToBoston #BostonLifestyle #BostonRestaurants #BostonBusinesses #LuxuryRealEstateAgent

Additional Tips:

- ***Thumbnail:*** *Use a high-quality image of an iconic Boston landmark or a beautiful luxury home.*
- ***Cards and end screens:*** *Use these to link to other relevant videos or playlists you've created (e.g., neighborhood tours, specific property listings).*
- ***Engage:*** *Respond to comments and questions to build a community around your channel.*

Channel management: Example #2 (Video SEO)

I am an astronomer who wants to share basic facts about the universe with the world, and I am trying to build a successful YouTube channel to get a high number of subscribers. Give me ideas of videos people may be searching for on YouTube, and titles and descriptions of those videos.

- **Define your persona:** I am an astronomer who wants to share basic facts about the universe with the world.
- **Set your goals:** I am trying to build a successful YouTube channel to get a high number of subscribers.
- **Be specific:** Give me ideas of videos people may be searching for on YouTube, and titles and descriptions of those videos.

Here are the results:

Absolutely! Here are some YouTube video ideas, titles, and descriptions that cater to popular search terms and interests, designed to attract viewers and potential subscribers:

1. *Video Idea: What's the Difference Between a Meteor, Meteoroid, and Meteorite?*
   - ***Title:*** *Meteor vs. Meteoroid vs. Meteorite: A Cosmic Crash Course*
   - ***Description:*** *Ever seen a "shooting star"? It's probably a meteor! But what's the difference between a meteor, meteoroid, and meteorite? Join me as we unravel this cosmic mystery and explore the fascinating world of space rocks.*
2. *Video Idea: Why Do Stars Twinkle?*
   - ***Title:*** *Why Do Stars Twinkle? (And Planets Don't!) – An Astronomer Explains*

- ***Description:*** *Ever wondered why stars seem to flicker in the night sky, while planets shine steadily? Let's dive into the science behind twinkling stars and discover how our atmosphere plays a role in this captivating phenomenon.*

3. *Video Idea: How Do We Know the Age of the Universe?*
   - ***Title:*** *How Old is the Universe? (And How Do We Know?)*
   - ***Description:*** *The universe is ancient, but how do we know its age? Join me as we explore the cosmic clues, from the Big Bang's afterglow to the expansion of the universe, that help us determine this mind-boggling number.*
4. *Video Idea: What Happens When Galaxies Collide?*
   - ***Title:*** *Galactic Collisions: A Spectacular Dance of Destruction and Creation*
   - ***Description:*** *Galaxies aren't just sitting still – they're on a collision course! Witness the awe-inspiring power of merging galaxies and discover how these cosmic crashes shape the universe we see today.*
5. *Video Idea: Is Time Travel Possible? (The Science Behind It)*
   - ***Title:*** *Time Travel: Science Fiction or Scientific Reality?*
   - ***Description:*** *Could we ever journey through time like in the movies? While time machines aren't here yet, the science of time travel is surprisingly intriguing. Let's explore the mind-bending theories of Einstein's relativity and the possibility of bending time itself.*
6. *Video Idea: What's at the Center of the Milky Way?*
   - ***Title:*** *Journey to the Heart of the Milky Way: Unveiling the Galactic Center*
   - ***Description:*** *Our Milky Way galaxy holds a mysterious secret at its core. Join me as we venture into the galactic center and discover the supermassive black hole that lurks there, shaping the destiny of stars and planets.*
7. *Video Idea: What are Constellations, and Why Do We See Them?*
   - ***Title:*** *Constellations: Mapping the Night Sky and Unraveling Ancient Stories*
   - ***Description:*** *From the Big Dipper to Orion, constellations have fascinated humans for millennia. Discover how these patterns of stars formed, the stories they inspired, and how you can find them in the night sky.*
8. *Video Idea: Can We Live on Mars? (The Challenges and Possibilities)*
   - ***Title:*** *Life on Mars: Is it Our Next Home?*
   - ***Description:*** *Mars has captured our imagination as a potential second home. But can we really live there? Let's investigate the challenges of surviving on the Red Planet and the exciting possibilities of establishing a human colony.*

9. *Video Idea: Debunking Common Astronomy Myths*

   - ***Title:*** *5 Biggest Astronomy Myths Busted!*
   - ***Description:*** *From the moon landing hoax to the idea that we only use 10% of our brains, let's separate fact from fiction and debunk some of the most widespread misconceptions about astronomy and space.*

10. *Video Idea: What is Dark Matter and Dark Energy?*

    - ***Title:*** *The Universe's Biggest Mysteries: Dark Matter and Dark Energy Explained*
    - ***Description:*** *The universe is filled with invisible stuff – dark matter and dark energy. Join me as we unravel these cosmic enigmas, exploring what we know (and don't know) about these mysterious forces shaping our universe.*

I hope these ideas spark your creativity and help you build a thriving YouTube channel!

Using AI Responsibly

WARNING

It is important to note that AI tools are not perfect. In August 2024, one of the most advanced models in the world, ChatGPT, insisted to a famous TikTok creator that there were only two Rs in the word strawberry. When the tool was corrected, it continued to insist there were only two Rs. When AI makes silly mistakes like this, it is referred to as a *hallucination*. Because of how AI is trained to generate and predict text, it can sometimes seem as though it is making up an answer, or getting in completely wrong. Although this mistake seems harmless, others are not.

So, although AI can be a helpful tool, always make sure to check any facts or important information. Trust but verify — that's always a good thing to keep in mind when using any AI tools.

AI can be a very helpful tool in your everyday life and in building your YouTube channel. Don't be scared to test it out and learn what works best to help you be creative and build your channel. Think of AI as the assistant that you didn't know you needed and try giving it the tasks that you don't like.

REMEMBER

The rules and regulations for AI are changing, and it is important to remember a few key guidelines when interacting with and using AI:

- **Keep private things private:** Remember not to include confidential or personal info or data you don't want shared with AI technologies. How they use your prompt information is continually changing, and a good rule to stick

by is if you don't want anyone to know it, don't type it into any AI tools. *Never* share confidential or personal information.

- **Use your best judgment:** AI-generated content may be inaccurate at times. Don't rely on this feature for medical, legal, financial, or other important advice. Use your best judgment if things are very important, consult a professional — not an AI tool. It's part of your responsibility when using AI to avoid spreading misinformation and not to perpetuate harmful biases.
- **Do not violate copyrights:** You can use these tools to research and learn, similar to how you would use a Google search engine. YouTube's terms of service will continue to be updated based on current AI technologies. Make sure you are always working within the terms of service.
- **Be transparent:** If your friend gave you a great idea for a video, you would probably tell people it was their idea and give them a little credit. It's a good idea to do the same with AI. It is always a good idea to be open and transparent with the tools you are using and give credit where credit is due — even if you do not think it is a copyright issue.
- **Trust but verify:** If you are asking any facts or important information, always double check with a second source. As mentioned, AI is not always correct, so always verify important information.

5 The Part of Tens

IN THIS PART . . .

Learning how you can improve your YouTube search results

Exploring the intricacies of copyright law

IN THIS CHAPTER

- Defining and optimizing video metadata
- Improving channel search results
- Staying away from misleading metadata

Chapter 15

Ten Key Steps to Improving YouTube Search Results

YouTube is about one thing: getting people to watch your content. Before they watch it, though, they have to find it. Simple, right? In theory, yes, but your challenge is to help viewers find your channel and your content. That's what search results are all about: placing your content in front of the right viewers so that they can watch it.

Unfortunately, YouTube doesn't share the secret sauce for getting discovered, but there are ways you can improve the odds of your videos showing up at the top of YouTube's search results and in the Up Next recommended video feed on the

Watch page. To get those tools to work for you, you need to optimize both your channel and your videos for discoverability. To let YouTube understand what your videos are all about, then, you need to include metadata that describes the content for YouTube to index. (That's part of the optimization process.) In this chapter, we describe ten key steps for improving YouTube search results for your content.

Update the Video Metadata

YouTube *metadata* refers to information you use to describe and categorize your video — like the video title, video description, keyword tags, and even your thumbnail. When uploading new content to your channel, YouTube walks you through the steps to add specific metadata to your video. If you want to go back and tweak that metadata later as part of your optimization strategy, follow these steps:

1. **Log in to your YouTube account.**
2. **On your YouTube page, click the Channel icon and then choose YouTube Studio from the menu that appears.**
3. **Click the Content tab in YouTube Studio.**

   By default, you should go directly to the Channel content submenu, which displays all the content you've uploaded to YouTube.
4. **Find the video you want to optimize and click the Details button that appears when you hover over the video.**

   The Details button is represented by a pencil icon.
5. **Modify the thumbnail, title, description, and tags to better reflect your optimization goals.**
6. **When you're done, click the blue Save button at the top right.**

The search results from Rick Beato's videos in Figure 15-1 show good metadata — compelling thumbnail images, great titles, and punchy description data. Metadata helps visitors make viewing decisions, and good metadata helps visitors make better viewing decisions.

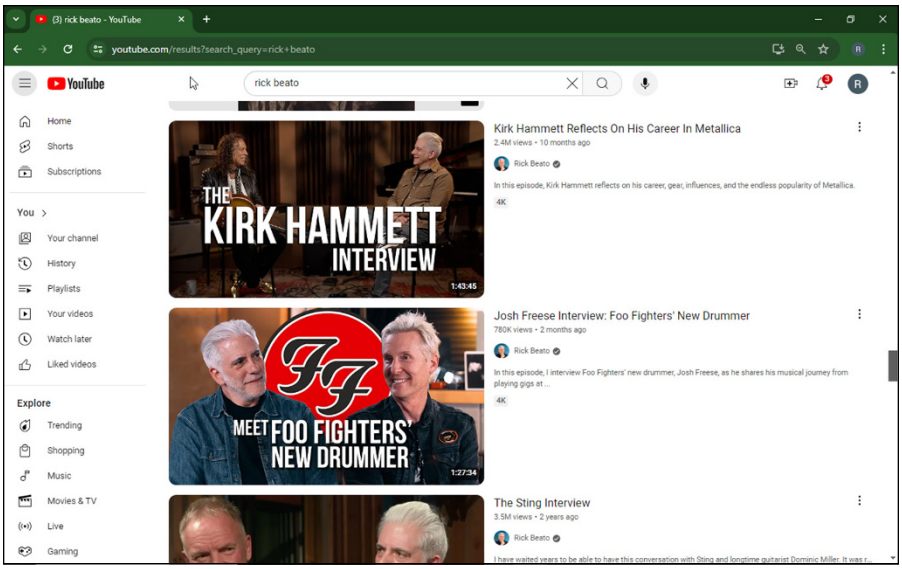

FIGURE 15-1: How YouTube video metadata shows up in search.

Manage Your Video Titles

Descriptive video titles are helpful to potential viewers and to YouTube's search engine. The title is one of the most important indicators used to index your videos. If you do nothing at all to improve your YouTube strategy, at least be sure to use a keyword-rich title — a title full of descriptive words or adjectives. This is especially important for YouTube Shorts, which only display the YouTube video title by default. A good title tells the viewer what the content includes and who created the video, such as "Easy stretches for runners led by certified yoga instructor." You may also add a relevant hashtag in the title to help users more easily find your content. (We cover hashtags in more detail a little later in this chapter, in the section "Manage Your Video Descriptions.")

REMEMBER

Good titles are 70 characters or fewer. Any longer and the title is cut off in search results. Mobile devices often show even fewer characters before the title is cut off. If you have a large mobile audience, put the most important keywords at the beginning of the title so that they're visible to all users.

Optimize Thumbnails for Viewer Session Time

A *thumbnail* is a visual snapshot of your video, similar to a poster for a movie. It has a tremendous impact on a video's success, so you *need* to choose a good one to grab the attention of your audience. By default, YouTube chooses thumbnails from three optional frames taken at the beginning, middle, and end of your video file. You can, however, create a custom thumbnail for each video. If you do so, choose a thumbnail that's illustrative of the content in the video. Thumbnails show up in the following areas:

- **Channel pages:** Thumbnails create a visual grid on YouTube channel pages, representing the content library.
- **Search results:** When people search for content on YouTube, thumbnails are displayed alongside the video title and video description to entice viewers.
- **Browse features:** Thumbnails show up on the YouTube homepage and other browsing features, such as the Suggested Videos feed and the Trending Videos feed.
- **Embedded videos and search engines:** Thumbnails are frequently displayed when YouTube videos are embedded in other websites. They also appear in popular search engine results under the Video tab.

Although it's vital that the title of your video accurately reflects its content, it's even more important for a viewer's mobile viewing experience that you add a compelling video thumbnail. Users often base the decision of whether to watch your video on the appeal of the video thumbnail.

WARNING

Your thumbnail should not confuse or mislead viewers; it should prepare them for the entire viewing experience. Avoid overly deceptive tactics that might be perceived as clickbait. Clear, striking images with easy-to-read descriptive text or branding work best. You can even select a playlist thumbnail to further entice viewership by using a custom thumbnail from one of your videos in the playlist.

REMEMBER

Playlists, which can show up in YouTube searches along with the video results, often lead to longer viewing sessions. The longer a viewer's session watch time, the better your video and channel ranking. Viewer session watch time is the primary ranking factor on YouTube's search engine.

Manage Your Video Descriptions

The video *description* is a 5,000-character field that YouTube provides for you to describe your video. It's a great place to add details about not only your video but also your channel, along with links for other videos, subscriptions, other channels, and merchandise. In other words, it's a goldmine for both metadata and user guidance. The viewers who care about your video will read the description, so make it worth their while.

The first two lines of the first paragraph of the description (approximately 100 characters) comprise the only element that shows up in YouTube search results; thus, it's the most important part of the description copy. Everything that follows is consumed by YouTube's algorithms and passionate followers who click the More button in the description copy. The first line should describe the content of the video and grab viewers' attention with exciting copy to lead them into the viewing experience. If you don't have a lot of time, focus your creative energy on the first paragraph. If you're having trouble, using AI tools like ChatGPT or Gemini can help you craft a well worded video description.

The first line can also include a link to your website or other content you've uploaded if you'd like to keep your audience around for longer. The best practice is to include a short link to save space — you can compress any link by using a link shortener like `bit.ly`, a free link-shortening website. The link might lead to a playlist with the video, a landing page on or off the YouTube site, a product page, or a blog. Figure 15-2 shows an example of a good video description.

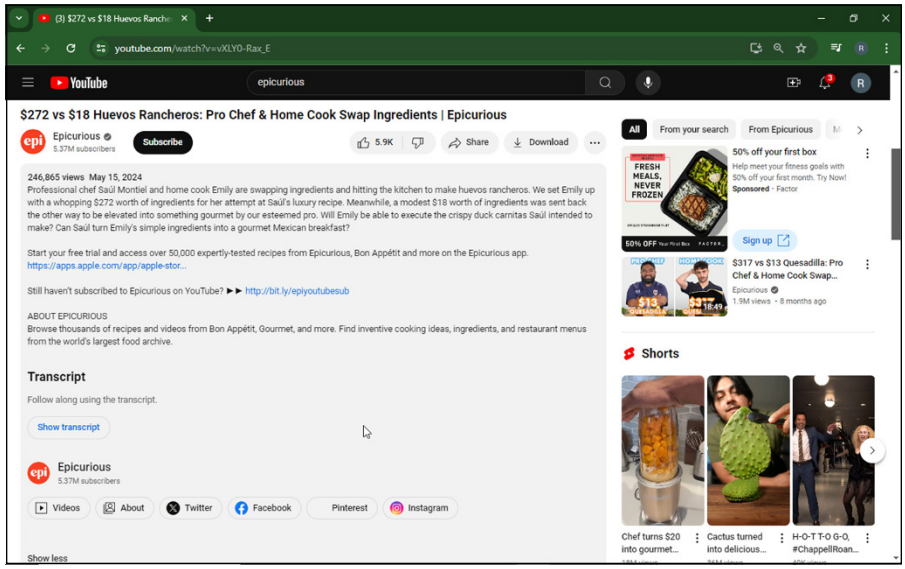

FIGURE 15-2: YouTube video description copy.

You can also include hashtags in your video description. A *hashtag* is a word or phrase that is spelled out without any spaces and preceded by the pound sign (#). Hashtags are used on social media websites to label content, making it easier to search for a specific topic. If you don't use a hashtag in your video title, YouTube displays the first three hashtags you include in your description above your video on that video's Watch page. Using hashtags is a great way to help users find your content, especially if you're making videos that cover current trends. Be careful not to overdo it in adding hashtags to your videos, however, because YouTube penalizes you for including more than 15 in a video.

REMEMBER

You can set up default metadata for your new uploads. Always remember to customize the title, tags, and descriptions of every video, however. Your metadata should closely reflect each video's unique content.

Add Closed Captioning

YouTube and certain other platforms let you upload text files that contain closed-captioning subtitles for your video. You can then reach people who have hearing impairments or prefer captions on and this pays off for your search engine ranking. The captions are used by YouTube Search to determine the topic of your video. (See Chapter 8 for information about adding captions.)

You don't have to write captions yourself. Several affordable services can create these caption files for you. Rev (`www.rev.com/caption`), for example, provides captions for only dollars per minute. Alternatively, you can use YouTube's automatic captioning feature, but keep in mind that because the captions are written by an algorithm, they're often imperfect.

Add Appropriate Tags

A *tag* is a keyword that identifies your video's content within YouTube for discovery. These unique, descriptive keywords are limited to 30 characters per keyword. Try to apply at least 15 tags per video, with a maximum of 500 characters per video. You can add tags when you upload a video or modify them later in YouTube Studio. Make the tags extremely relevant to your video content, and scatter them throughout the description copy as well. Start with the most specific tags first, to help viewers find your videos more easily when they're looking for a particular topic.

TIP

Start off with specific keyword tags, but if you have space, add some general ones as well to identify the category of your video, such as *beauty*, *DIY*, or *entertainment*.

Include Other Video Metadata

YouTube also offers additional metadata tags that are less talked about that might help improve your discoverability:

- **Made for Kids:** If your content is made for audiences under the age of 13, you must disclose that your content is made for kids. This metadata tag ensures your video reaches the right audiences and is legally compliant with privacy laws.
- **Language:** For every video you upload, you can select the language of the video content and the language of the video title and description. This helps ensure you are reaching people who speak the language of your content.
- **Recording date and location:** Add when and where the video was recorded to help viewers who are interested in searching for content by location tags find your videos.
- **Category:** Select the content category that is closest to the type of video you created so viewers can more easily find it.

Refresh Your Metadata

Recently published videos typically rank higher in YouTube Search because they are newer content — though we're not saying that all old videos disappear. Older, evergreen videos that have been watched frequently and are contextual matches for specific searches rank well and are still recommended by YouTube's algorithms. It's a good idea to revisit your older video content every so often and add any new or trending metadata terms that are relevant. This will improve the odds of your content remaining highly discoverable.

TIP

In addition to refreshing your metadata, be sure to refresh your end screens to link to newer, more relevant videos and playlists on your channel. (*End screens* are interactive cards that you can place in the last 5–20 seconds of your videos that allow you to promote additional channel content; see Chapter 7 for information about end screens.)

Add Channel Keywords

Channels can also show up in YouTube searches along with video search results. If you search for one, you will see the Channel icon and the first few lines of the channel description in the search results. To ensure that your channel appears in the search results, you must let YouTube know what your channel is about. It has a description field that you can use to communicate precisely what content viewers can find here. (See Chapter 3 for instructions on how to update and edit your channel description.)

A channel also has a field for keywords that you can use, just like you use the Tags field for videos. To update your channel keywords, follow these steps:

1. **Log in to your YouTube account.**
2. **On your YouTube page, click the Channel icon and then choose YouTube Studio.**

   Doing so brings up the YouTube Studio dashboard.
3. **Click the Settings heading in the navigation menu on the left.**
4. **In the window that opens, choose Channel from the navigation menu on the left.**
5. **On the new screen that appears, you will see a tab called Basic Info.**
6. **On the Basic Info tab, you will see an option to add keywords.**

   For reference, Figure 15-3 shows what this menu looks like.
7. **Add relevant, descriptive keywords, separated by commas in the Keywords field.**

   Use a maximum of five to seven keywords to ensure that you're using the most relevant words. Just like for videos, the Channel Keywords section has a 500-character limit.
8. **When you're done, click the Save button.**

TIP

Create a keyword-rich channel description. Craft an engaging first few lines of the channel description because those elements are revealed across YouTube with your channel.

REMEMBER

Add specific keywords first and then finish off with broader terms, if space allows.

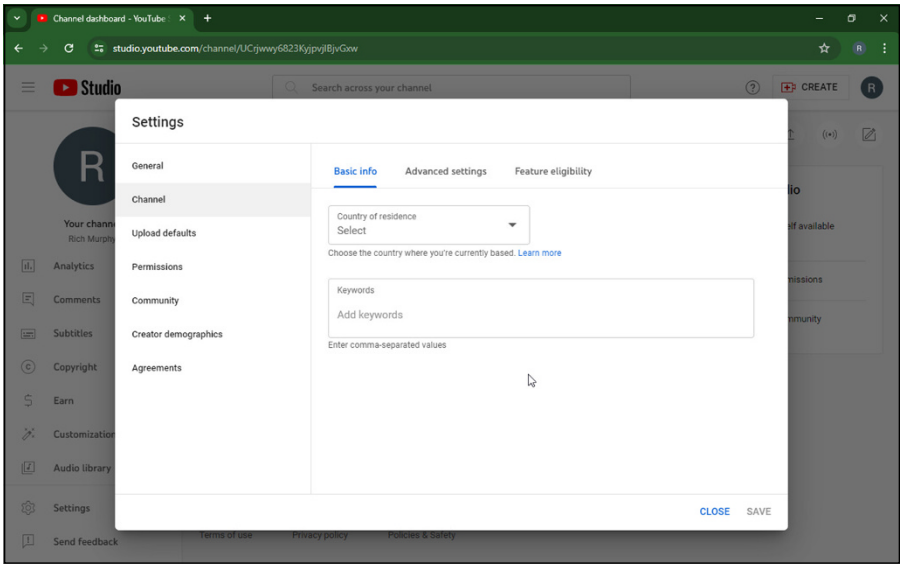

FIGURE 15-3: YouTube channel keywords.

Avoid Misleading Metadata

Using misleading or deceptive metadata is against YouTube policies. You cannot include metadata that isn't contextually relevant to your video content or that misrepresents the video's content. You cannot add a series of unrelated tags to your description copy to show up for additional search results. This is known as *keyword stuffing*. If Taylor Swift isn't in your video, don't add her name to the title, tags, or description just because you think it will yield more views. Trust us, it won't! Adding misleading information or repetitive words in the description copy and tags is interpreted as spam by YouTube and will hurt your discoverability.

REMEMBER

The most important thing is not to trick viewers into watching your content with misleading titles, thumbnails, tags, or description copy. These resources are at your disposal to add more contextual value to your video asset — not to fool viewers into clicking. Adding misleading metadata is a futile exercise. When viewers click on your video and fail to find what they're looking for, they click to go elsewhere quickly. This hurts your watch time statistics and your search rankings. YouTube excels at detecting spam and misleading metadata, so trying to game the system will never succeed in the long run.

IN THIS CHAPTER

- Understanding copyright law
- Striking out with copyright infringements
- Avoiding common mistakes
- Knowing what to do when copyright is breached

Chapter 16
Ten Things to Know About Copyright

John Locke said, "The end of law is not to abolish or restrain, but to preserve and enlarge freedom." In the same spirit, copyright law protects creators from having their material used without permission by people who didn't create it. The goal is to protect the creator's freedom to create without fearing that others will profit unjustly. Create something, and the intellectual property belongs to you by way of copyright. If anyone palms off your intellectual property as their own, the law protects you and provides measures for legal action. And, if your copyrighted content should appear in video form on YouTube without your permission, YouTube acts as the law on your behalf.

Copyright protection is great if someone is trying to take advantage of you, but sometimes, it's you who ends up on the hot seat. Thanks to the rise of social media and the explosion of video content online, people often create things that use other people's work — such as adding music that someone else created to a video they've made — and they don't realize that they're doing anything wrong. Collaboration is a good thing and is encouraged on YouTube, but you need to have the proper permission to use any music, artwork, photograph, excerpt, or any other artistic or intellectual work created by an individual other than yourself before you put it in your YouTube videos.

WARNING

When someone infringes on copyright — whether someone does it to you or you do it to someone else — there *are* consequences. YouTube takes copyright seriously and will take different levels of recourse on infringing videos, depending on the scenario. In some cases, YouTube even penalizes the offender with a strike on their account. And as in baseball, if you take three strikes, you're outta there! YouTube boots you and your channel if it gets to this point, ruining all your hard work.

To ensure that it doesn't happen to you, follow the advice in this chapter.

Remember Who Owns the Copyright

It's simple: If you created the video, the copyright belongs to you; if you upload content created by someone else, the copyright belongs to that person, and you had better have permission to upload it.

As soon as the work is created, so is the copyright, and since 1992, there's no longer a renewal process. Copyright lives for the duration of the life of the creator — and even lives on for a period after their death.

Basic stuff, right? But often it's the most basic rules that are not followed. People jaywalk all the time, and people violate copyright all the time on YouTube, too. That means YouTube is kept busy because if another user uploads your content without your permission, or if you do the same, YouTube will take action, such as taking the video down, to uphold copyright protections.

Attribution Does Not Absolve a Copyright Violation

Some people steal other people's work and claim it as their own, and that's blatant infringement. But it's no less of an offense when you use content and then add the line to the video description "created by so-and-so," "no copyright infringement intended," or "all rights belong to their respective owners." *Attribution is not permission.* It's still a breach that can earn you a Content ID claim, or a copyright strike and a blocked video, which ultimately impacts your ability to grow your

channel and monetize it. You can read more about this in the section later in this chapter titled "Know the Consequences."

If you use someone else's work in your video without that person's permission, it doesn't make it less of an offense just because you give the person credit. You're still in violation if you don't have their express consent. The only exception is fair use, which we tell you more about later in this chapter.

Here are some elements to watch out for in your videos:

- **Music:** If you didn't write it, didn't play it, didn't record it, and didn't get permission to use it, you can't use it in your YouTube video. If you're struggling to find royalty-free music for your YouTube video, check out YouTube's Audio Library to browse their massive collection of free-to-use tracks and sound effects at `www.youtube.com/audiolibrary`. You can also license mainstream music from the Creator Music library for a small fee, which may also require you to share any revenue from your video with the music copyright owner. You can learn more about Creator music at `www.support.google.com/youtube/answer/11610212`.
- **Someone else's pictures, videos, or audio:** Pictures and videos found on the Internet are not yours for the taking. Instead, try a practical solution, like purchasing inexpensive rights to images or videos on various stock photo sites, such as `www.istockphoto.com`, `www.shutterstock.com`, and `www.stock.adobe.com`. If you're more budget conscious, look for websites that use the Creative Commons Zero (or CC0) license. Photos and videos released under the CC0 license are released without restriction and are free to use without attribution, even for commercial purposes. If you're making short form content, you can also consider taking advantage of YouTube's Shorts remix program to sample other creator's videos and audio clips in your own Shorts video. This new initiative handles all the permission and attribution requirements to ensure that your content is copyright compliant. Learn more about YouTube's Shorts remix program at `www.support.google.com/youtube/answer/10623810`.
- **TV or movie clip:** Again, you can't simply use this type of content — unless it's already in the public domain — even if you provide attribution to the creator. Some exceptions are afforded under the principle of fair use and other special licensing agreements like YouTube's Shorts remix, which we describe later in this chapter. And even though a production studio may not track you down and ask you to remove it, YouTube eventually will, and it will throw you a fastball over the plate.

Know the Consequences

YouTube takes copyright issues seriously — and it blocks, demonetizes, or takes down any video that infringes on copyright. Two things can happen on YouTube when there's a copyright violation, and though they sound similar, they're completely different:

- **Takedown notice:** If someone spots content that they've created being used without their permission, they can send YouTube a complaint. If it's a breach, YouTube takes down the video and issues the offender a copyright strike. A copyright strike is essentially a warning on your account that means you violated copyright protections. If you are issued three copyright strikes in a short period, your account gets banned from YouTube, and all your hard work will be erased.

  WARNING

  If you feel compelled to lodge a complaint against someone else's video, just be extra sure that it's your content and that the breach is accurate, because you're initiating a legal process.

- **Content ID match:** If YouTube's algorithms determine that someone improperly used material that has been uploaded to their Content ID platform, YouTube files a copyright claim automatically on the copyright owner's behalf. YouTube doesn't immediately take down the video, however. Instead, it allows the copyright owner to take a few different measures of recourse.

  Content ID is a system YouTube uses to automatically match newly uploaded content that violates copyright against millions of videos that they have catalogued. For Content ID to work properly, copyright owners have to upload *reference* files — original versions of their work that prove they own the rights to a piece of work. Typically, record labels, movie studios, and TV stations complete this process for all the work they publish, so individual artists and producers don't have to worry about protecting their work. Every new video uploaded to YouTube is checked against this huge library of reference files, and if a match is found, YouTube automatically files a copyright claim for the owner of the work.

Unlike a takedown notice, a Content ID claim doesn't result in a copyright strike on your channel, however. Content ID claims are most commonly leveraged by copyright owners to profit from the use of their content in your videos by monetizing them with ads. Any ad revenue generated from the infringing video is then given to the copyright owner directly. Content ID claims can also be used to block your video from specific countries or even the entire world if the copyright owner really doesn't want you to use their content. Though these outcomes may sound frustrating, it's important to remember that if you remove the claimed content

from your video, you regain full ownership of your creation. This could involve something as simple as swapping out the music in your video for a royalty-free soundtrack.

Unfortunately, it's possible to have permission to use music, pictures, or video yet *still* have a Content ID claim filed against you. Content ID is an automated process, and the idea is that claims are triggered when YouTube's algorithms detect that the musical, photo, or video content belongs to a copyright owner other than yourself. But don't worry: If you had permission to use that content, you can file a dispute challenging the accuracy of the claim. To find more information about Content ID and the processes behind it, go to `www.youtube.com/yt/copyright`.

The Profit Motive Is Irrelevant

Some folks will say, "Hey, it's all right if I use someone else's content, because I'm not looking to make any money." Tell that to the judge and the verdict is still "Guilty of copyright infringement!"

Whether you intend to make money from the video or you simply want to share your masterpiece with the world, it doesn't mean that you can violate copyright law. You need to get permission from the copyright owner. Having no intention to profit doesn't legally absolve you if you use someone else's content without permission on YouTube.

Get Permission for Using Copyrighted Material

Getting permission to use someone else's copyrighted material is often well within the realm of possibility. A nicely written note explaining how you would use the content usually is enough for a rights owner to grant permission. Just remember that it can get dicey because sometimes permission to use a snippet of someone else's content comes with the caveat that you cannot monetize the overall video. That restriction can hurt big-time if your intention is to quit your day job, but it could be a solution if you're merely looking to add flavor to your video.

If you're having difficulty reaching a copyright owner to ask for their permission or you don't want to wait for a response, consider paying for licensed music from the Creator Music Library or using content made available under a Creative

Commons license. Any content released under a Creative Commons Attribution license (sometimes called a "CC BY" license) is free to repurpose on YouTube, as long as you give credit to the original creator. You can find many other types of Creative Commons license designations (such as CC0, which we mentioned earlier in this chapter). Be sure to determine whether a piece of content has any specific use limitations before adding it to your own video. For more information on Creative Commons licenses, visit `https://creativecommons.org`.

Fair Use Can Be Complicated

Fair use is a legal doctrine in the United States that permits limited use of copyrighted materials in your YouTube videos *without* requiring permission from the copyright owner. The concept of fair use exists in other countries as well, where it is often referred to as fair dealing. Many misconceptions exist surrounding fair use, and among them is the notion that you can use anything you want in your video if you don't exceed some arbitrary time constraint. But it's much more complicated than that. In some editorial situations, you can use copyrighted material without permission, but you must fully understand those situations to avoid future trouble.

If you decide to exercise fair use, here are a few acceptable uses to consider:

- **Criticism:** Reviewing a movie or some form of music makes it perfectly acceptable to use copyrighted material without permission — short clips on the work you critique, for example.
- **Parody:** If you're poking fun at something, it's acceptable to use content without first gaining permission.
- **Commentary:** This one depends on how you use the material. If you use just enough to illustrate your point, it's acceptable. For instance, gamers on YouTube often record themselves playing a new video game and offer funny observations. This is, within limits, fair use.
- **Academic:** If you're creating educational content, it's considered fair use to reference other works in certain situations.

In all these cases, consider whether your contribution to the original copyrighted work is "transformative." If you're adding substantially new meaning or expression to the original work, your contributions are transformative, and you're likely within the bounds of fair use.

And now, for some misconceptions:

- **You can use 40 seconds of anything.** This is completely untrue. You can't use even *four seconds* if it doesn't comply with the circumstances in the preceding list. As a best practice, use the least amount of copyrighted material to get your point across and always credit the original copyright owner.
- **You can decide what is fair use for yourself.** Fair use is complicated for many situations, so you may not be sure exactly what you're allowed to do. The thing is, if you stretch the limits of fair use too far and harm the original copyright owner's ability to profit from their work, you can be sanctioned by YouTube. That's why a copyright attorney should decide any serious question over fair use.

Don't Let Copyright Issues on YouTube Lead to a Strikeout

Now that we've talked about the basics of copyright on YouTube, let's talk about account strikes in more detail. "Three strikes and you're out" is a common understanding when playing baseball. But in baseball, you get another chance after another eight batters have had their try. YouTube doesn't share this benevolence, so if it gives you strikes — especially for copyright issues — that means a lifetime ban from its partnership program. That's something you don't want on your record; worse yet, once that happens to you, you can't recover any of your videos. So, avoid getting strikes at all costs.

If you misbehave on YouTube's platform, you can draw two types of account strikes:

- **Community guideline.** This type of strike does not deal with copyright, but can result from a variety of causes, ranging from uploading objectionable content to having a misleading thumbnail or caption. YouTube updates their community guidelines regularly as the Internet evolves, so it is important to stay on top of any changes. To read more about YouTube's community guidelines, visit `www.youtube.com/about/policies/#community-guidelines`.
- **Copyright.** As we have covered in this chapter, if some part of your video includes content from another creator and that creator did not grant you permission or you did not properly license the content, you may get a

copyright strike. You can appeal it or take down the video to avoid a possible strike within a week of being notified of your infringement by the content owner. However, if you do not resolve the issue within that timeframe, you will likely receive a strike, which will limit your account features for a period of time.

Other things you should know if you receive a copyright strike:

- **Mandatory copyright school must be completed.** After your first strike, YouTube requires that you complete an online course and take a quiz to be sure you're up to speed on copyright regulations.
- **Strikes come down, eventually.** As long as you haven't struck out, community guideline strikes and copyright strikes disappear after 90 days from the time they're issued, at which point YouTube restores any channel privileges you lost while you waited out the strike. If you draw three community guideline strikes or three copyright strikes over a 90-day period, your YouTube channel will be terminated.
- **Your fate usually lies with the copyright owner.** As we mentioned a little earlier, the copyright owner can decide whether the video you uploaded should be removed, flagged in certain regions, or even monetized. Yes, that's right: Even though the video may contain only a small portion of the person's material, that person is entitled to all monetization proceeds — and can even put ads on your video, if you haven't added monetization.

REMEMBER

We cover how to check your YouTube account status for copyright strikes in Chapter 7 under "Preparing Your Channel for Uploads."

Wipe the Slate Clean

When it comes to removing strikes from your account, these two contradictory idioms come to mind:

- The squeaky wheel gets the grease.
- Don't open a can of worms.

If you draw a copyright strike from YouTube and you're positive that you're in the right, go ahead and appeal the strike with a copyright counternotification. By not staying quiet, you can fulfill the prophecy of the first idiom by having that strike removed.

Yet, let's examine that second idiom: If you're not sure you can win, maybe it's better to wait it out until the strike expires. You see, after you appeal the strike, your personal information goes to the copyright owner, and that person can possibly sue you for copyright infringement. If the situation reaches this level, you still can work out an agreement directly with the copyright owner and see whether that person will file an appeal with YouTube on your behalf, if you both agree that you were within your rights to use the copyrighted material. It's worth a shot.

An alternative you may want to consider before filing a copyright counternotification is to kindly ask the copyright owner to retract the claim of copyright infringement if you believe that an error has been made. In a case of mistaken identity, you might get lucky and get the strike removed immediately. Or, if your video has truly violated copyright, you can work out a deal to remove the offending content. This is likely the least complicated way to dispute a copyright strike. As for strikes related to the community guidelines, feel free to appeal those, because they're only between you and YouTube.

YouTube's Content ID Is Good at Finding Copyright Infringements

Whether intentional or inadvertent, sometimes the content of other creators gets used in a YouTube video. Sometimes the breach is noticed, and at other times it goes undetected by the original creator. But as YouTube continues to refine its copyright detection system, it finds the breach more quickly than ever. With over $100 million dollars invested in the development of Content ID and billions more paid out to copyright owners from ads on infringing videos each year, it's clear that Google has made copyright detection a major priority on YouTube. The advancement of artificial intelligence is likely to increase Google's capabilities in enforcing copyright protections in the future too, so it's best to understand the laws now.

Presently, YouTube's Content ID system uses sophisticated algorithms that scan every uploaded video and compares it to similar uploaded content, looking for matches with music, video, or pictures. It seems that music gets detected most often by this system. Even if it's just background music from a video you shot in public, you may get sanctioned if Content ID picks up the tune in your video. Usually, YouTube blocks the video or monetizes it for the content owner, and you must submit a dispute form to change this outcome.

Copyright Is (Almost) Forever

Copyright lasts for 70 years past the death of the author; after that point, the copyrighted content enters the public domain. When that happens, the content is no longer protected by intellectual property laws, and anyone can use it without permission. Of course, for many people on YouTube, that content isn't available to use without permission until we near the next century. And don't forget, if the creator (or the creator's heir) files a copyright extension, they can hold on to the rights even longer — that way, the video of your dog dressed as a spider can stay in the family for as long as possible.

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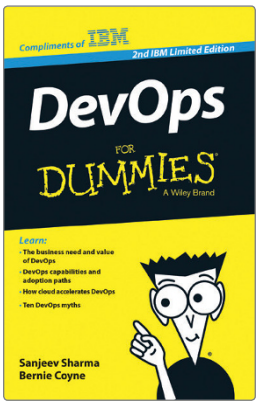

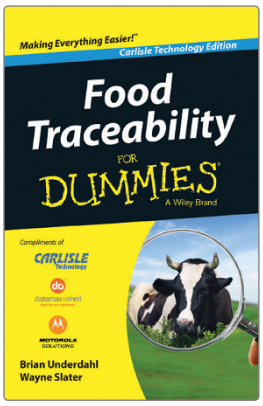

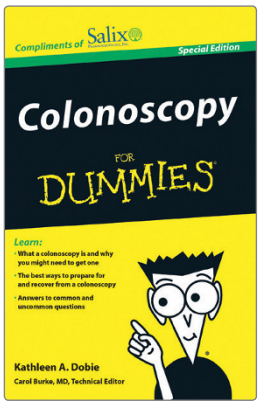

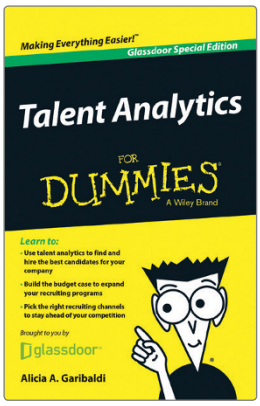

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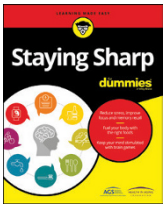

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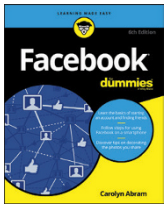

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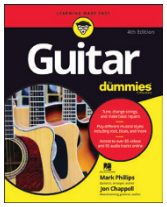

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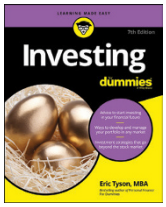

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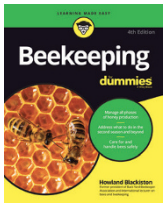

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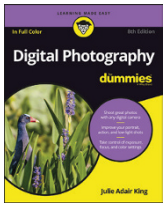

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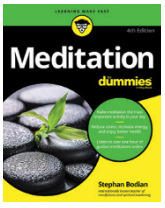

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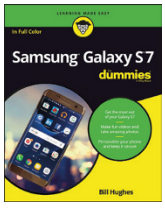

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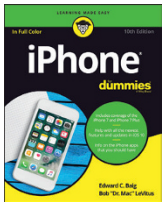

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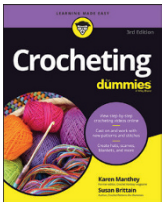

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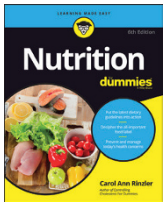

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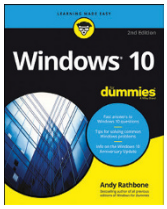

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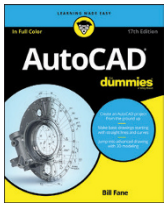

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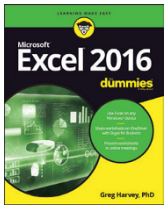

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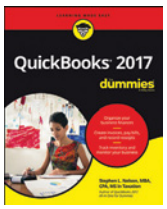

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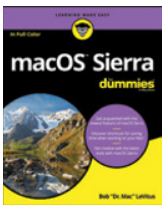

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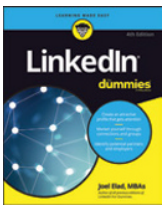

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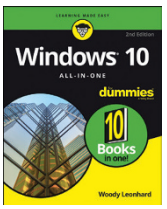

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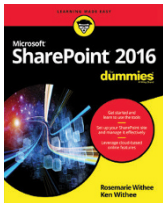

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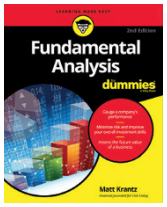

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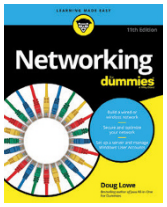

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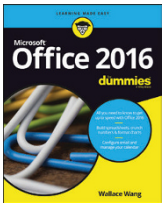

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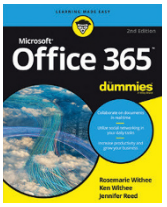

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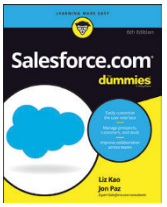

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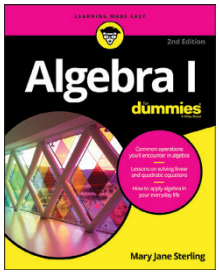

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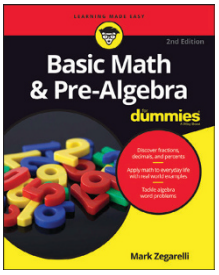

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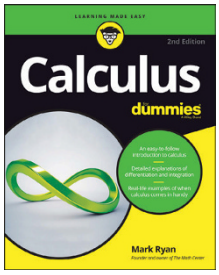

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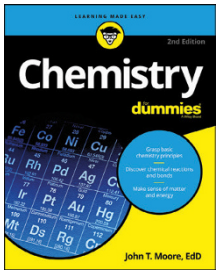

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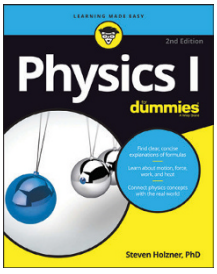

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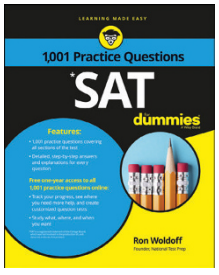

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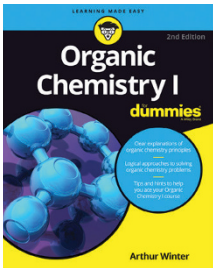

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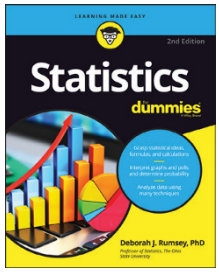

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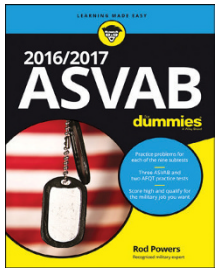

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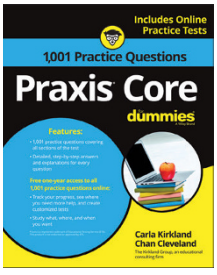

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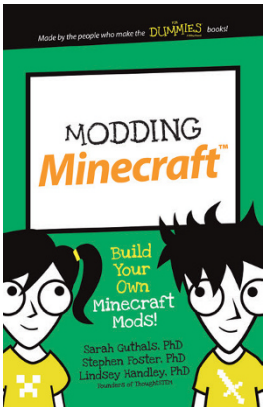

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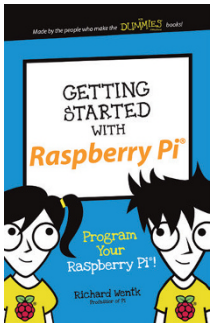

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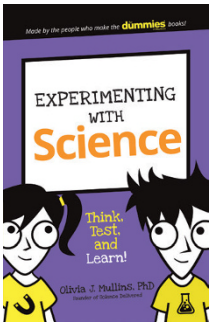

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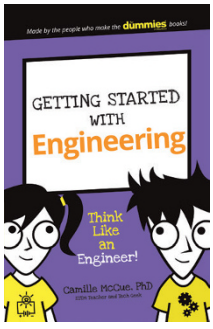

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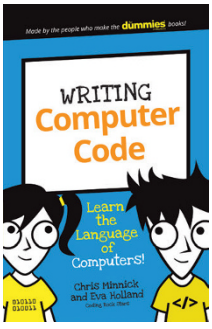

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